



ATMOSFERA
ORGÂNICA

Overview of Organic Consumption in Brazil

2023



How much has the Brazilian organic space advanced and how far can it go?

The Brazilian organic market continue to grow, as shown by the numbers in the fourth national survey by [Organis](#), conducted by [Brain](#) Inteligência Estratégica and made possible thanks to the sponsorship of [BioBrazil Fair](#), [Mercado Diferente](#) and [QIMA IBD](#).

But we are certain that this new set of exclusive information on consumer behavior towards organic products will be the foundation for even more significant advances, based on the updated, complete and reliable diagnoses made available to a wide range of market players.

On behalf of our members, and the organic market in general, we thank everyone who made it possible to carry out a project of this size, which involves professionals of the highest caliber, each of them adding their unique expertise, technique and insight.

This Overview of Organic Consumption in Brazil is yours, it's ours, it's everyone's, and it offers us a significant data base to further expand our Organic Space and all that it means in terms of life, transformation, and prosperity.

Enjoy.

Cobi Cruz

Director of **Organis**

Organic Trade and Promotion Association





Organic Trade and Promotion Association

Organis is the association that promotes, develops and represents the supply chain for organic, natural and sustainable products.

Its constant presence in a wide range of media outlets strengthens the associated brands among consumers, expanding the qualified and competitive insertion of organic products into the market.

Its efforts includes, among others:

- expanding media presence
- standout presence at major national trade shows
- advocacy of organic goods before commerce, industry, and government agencies
- strategic partnerships
- representation on the boards of important institutions
- creation and dissemination of original content with themes focused on marketing, science, research, and innovation



Market intelligence and strategic research

Brain Inteligência Estratégica is a research and consulting company in business, with a prominent national presence in Real Estate Market, Goods and Services Research and Business Strategy.

Since 2003, it has been delivering intelligence to organizations through tailored advice and a focus on generating clear and tangible value for the client.

Goals

1

Conduct a quantitative survey to evaluate the consumption of organic products in Brazil

2

Identify the organic consumers' profile

3

Evaluate the products and concepts more associated with organics

4

Evaluate the criteria for choosing organic products, such as: brands, stores, packaging, among others

5

Determine the willingness to consume organics in the near future

Technical specifications of the survey

Approach

Survey conducted through personal and individual interviews using a structured questionnaire with an average duration of 14 minutes.

Respondents were approached in areas of high foot traffic.

The interview period was April 19–May 10, 2023.

Universe

Brazilian population, responsible for the purchase of household grocery items, aged 18 years or older, residing in the municipalities selected for the sample.

Sample

The survey was conducted in two rounds, the first one aiming to show the penetration of organic products consumption in Brazil. In this general round, with 1,000 interviews, 360 respondents declared themselves to be consumers of organic products.

To dwelve into the details of the specific group, we conducted a second round of consultations, this time focusing only on this audience, involving 400 organic consumers from the same municipalities.

Confidence level and margin of error

The selected sample is statistically significant from the study universe and reaches a confidence level of 95%. Considering a simple random sample, the estimated margin of error, is approximately 2.8 percentage points over or under the overall results.

THE LARGEST FAIR FOR ORGANIC AND NATURAL PRODUCTS IN LATIN AMERICA



BIOBRAZIL FAIR

BIOFACH AMERICA
LATINA

into organic

18th INTERNATIONAL TRADE FAIR OF ORGANIC PRODUCTS AND AGROECOLOGY

ORGANIC
UNIVERSE
in movement



THE **BIO BRAZIL FAIR | BIOFACH AMERICA LATINA** is the largest fair in all of Latin America and the main business event, world trends and encourages new buying and consumption habits, bringing together farmers, rural producer, industry, retailers, sector professionals, health professionals and consumers in one place.

JUNE
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SÃO PAULO | BRAZIL
2024
10AM TO 8PM

PROMOTION

Francal Feiras DESDE 1969

COLLABORATION

NÜRNBERG MESSE



@biobrazilnaturaltech | #biobrazilfair

www.biobrazilfair.com.br

DI#ERENTE

Meet the foodtech **giving millions access to healthy foods** thanks to 'imperfect' organic produce

With a little more than a year, Diferente uses proprietary tech to stimulate the consumption of healthy foods and fight food waste

Diferente is a foodtech that offers a subscription box of organic fruits and vegetables while fighting food waste by offering items **that are considered too "ugly" to hit supermarket shelves.**

The company buys directly from farmers and ships them to consumers with **prices up to 40% cheaper than stores.** Each box is made up of 20-50% of items considered "ugly", but it's **100% organic.**



30% of everything harvested in organic agriculture is **thrown away** before hitting store shelves.

70% of these items thrown away are perfect for consumption but considered "**too different**". Crazy, right?

HOW THE STARTUP WORKS:

- Access www.mercadodiferente.com.br
- Put in your zip-code to **START**
- Determine the **quantity of items** you'd like
- Choose the best **day and period** to receive
- Finalize your purchase and edit your **preferences and restrictions**
- All set! Soon it'll be **at your door**

QIMA IBD

Ensuring Sustainable and Organic Production
From Farm to Fork



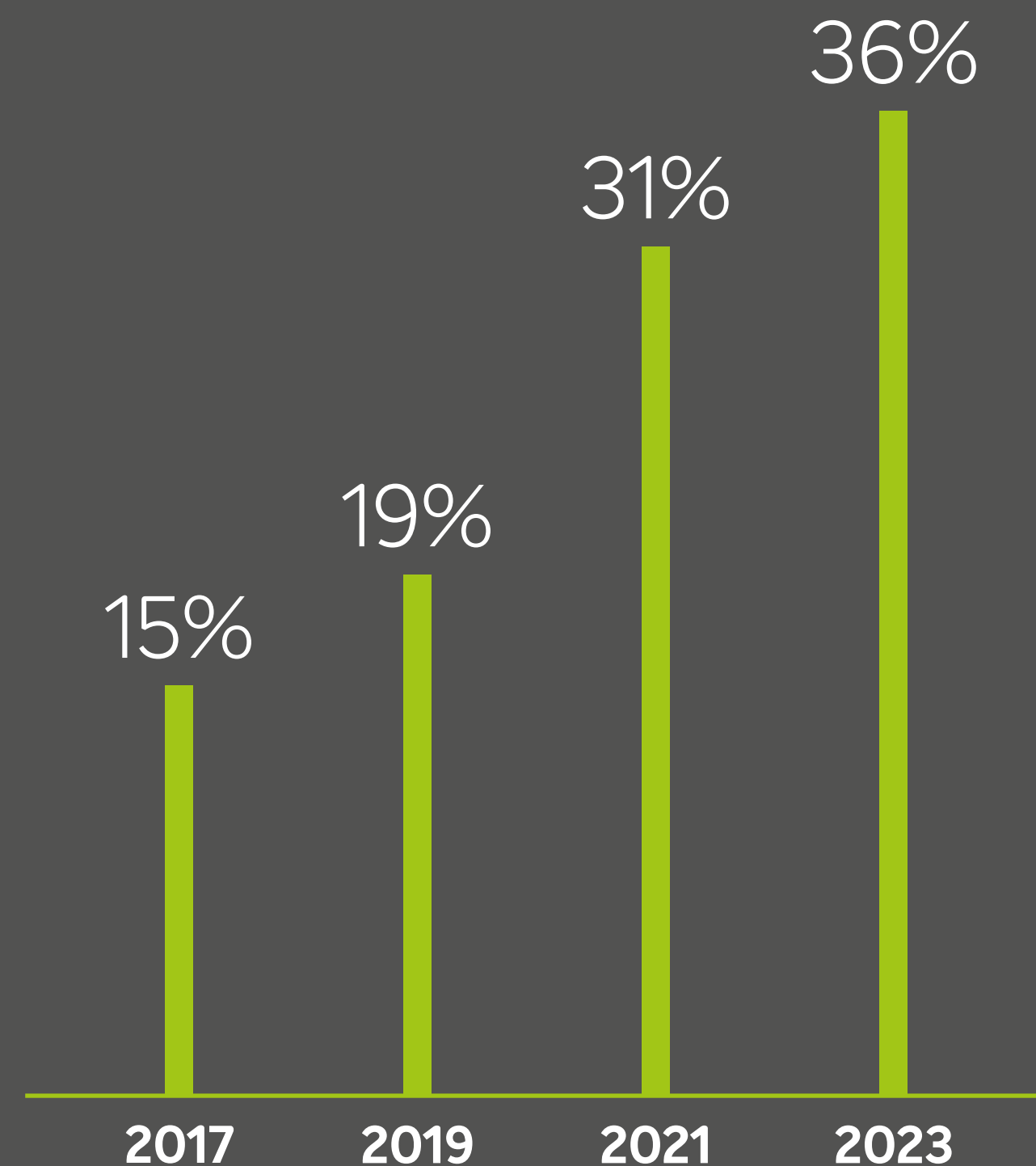
Animal
Welfare

Antibiotic
Free

GLOBALG.A.P.

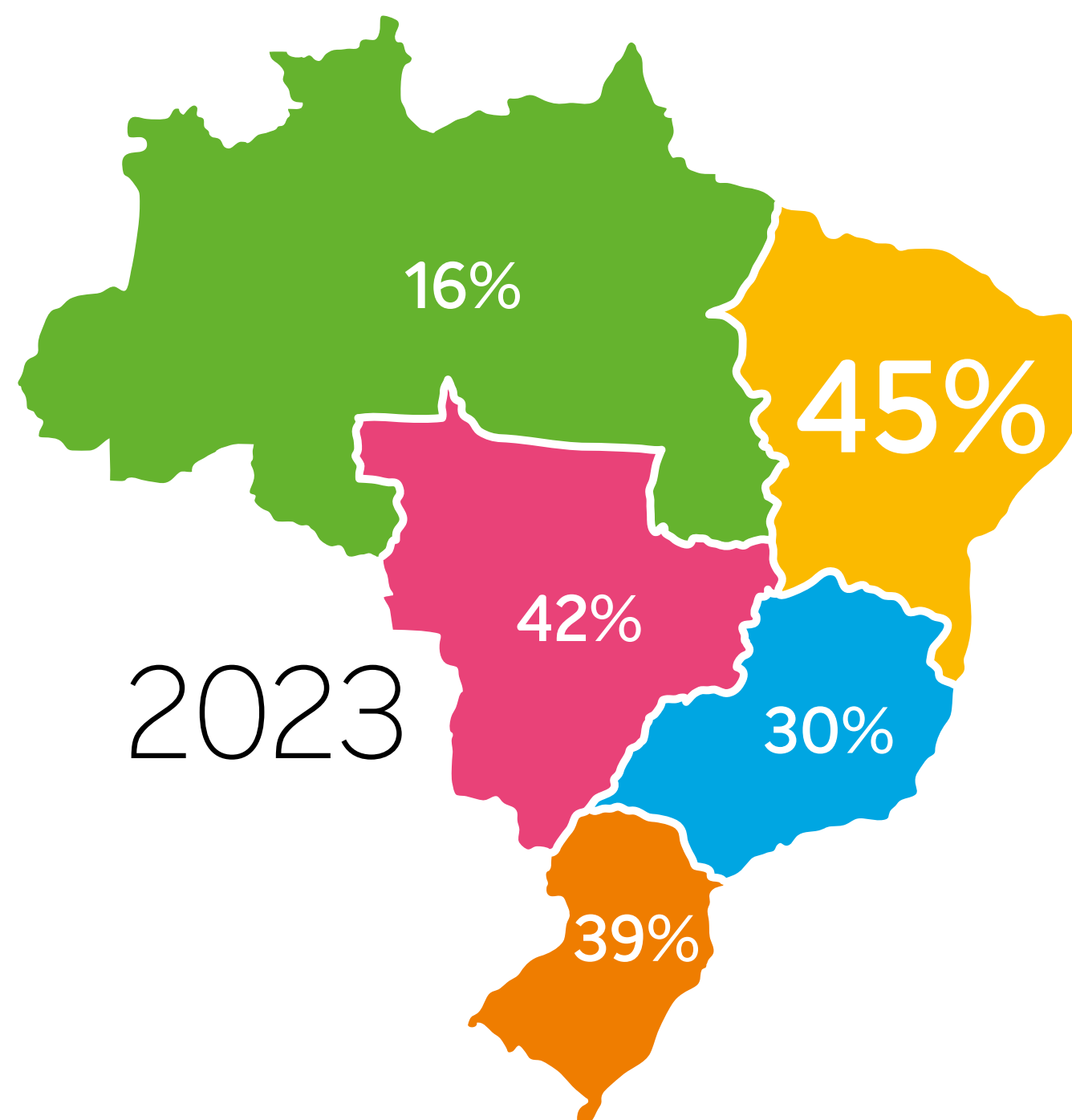
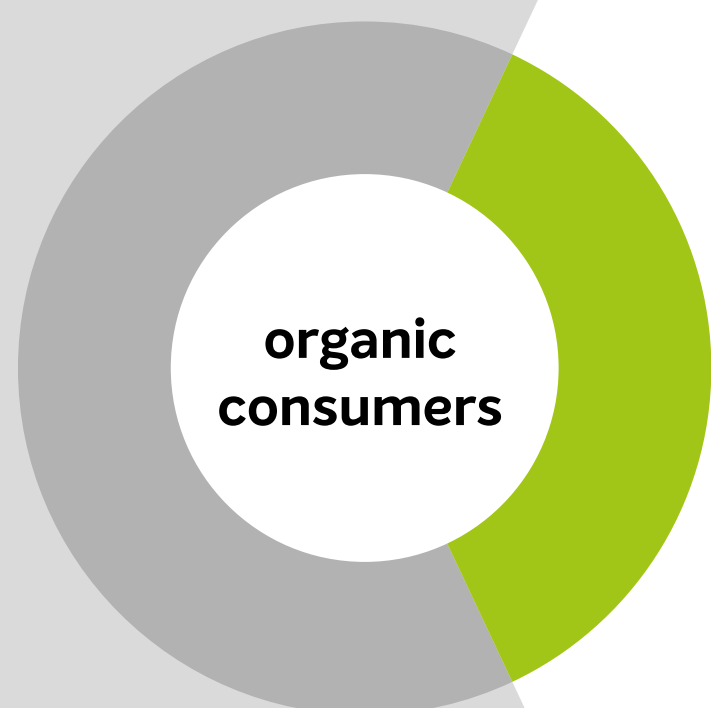
+55 14 3811 9800 | food@qima.com

Have you consumed organic products in the last 30 days?

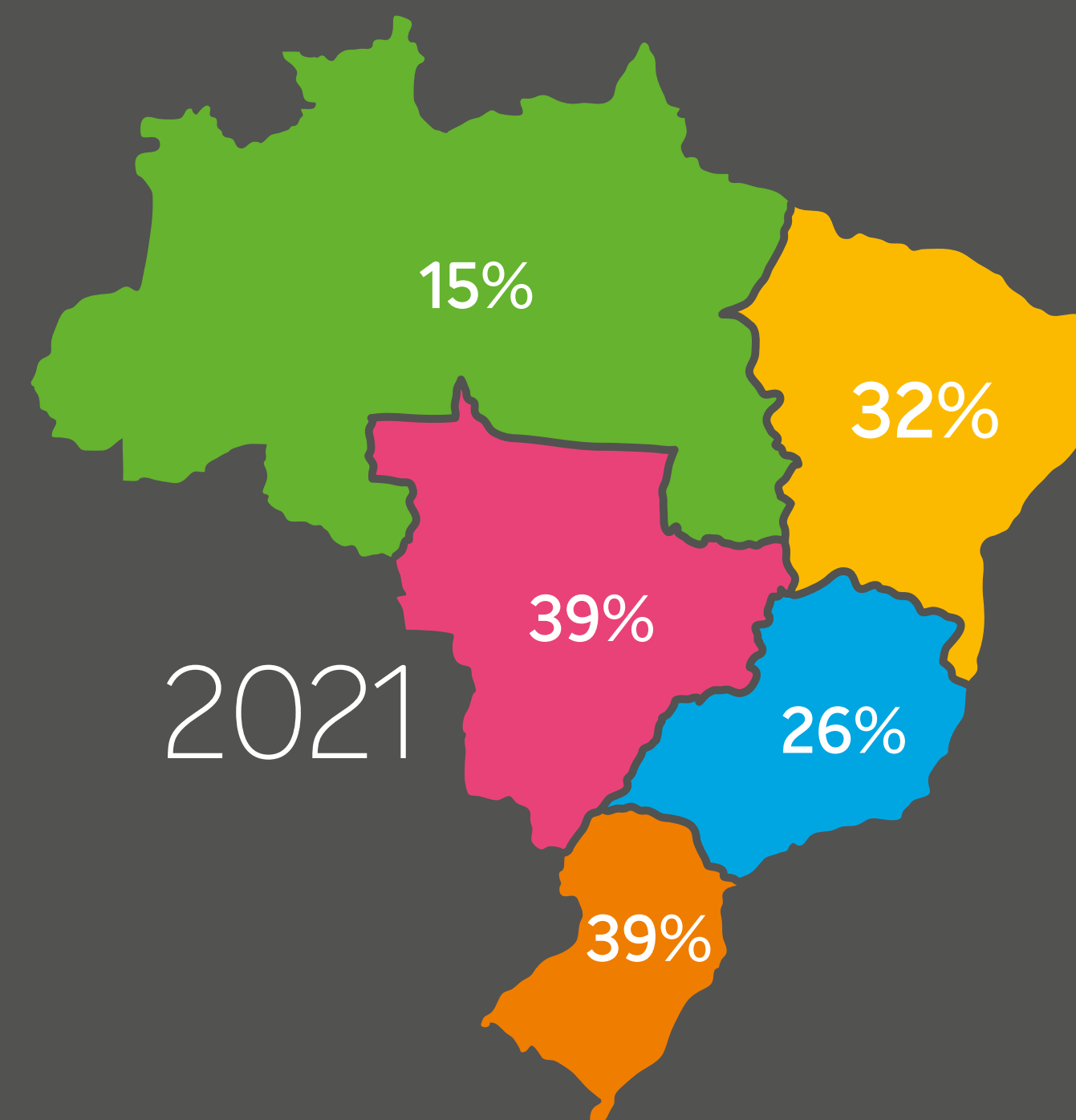


Consumption of organic products in the last 30 days

By region - Comparison 2023 - 2021

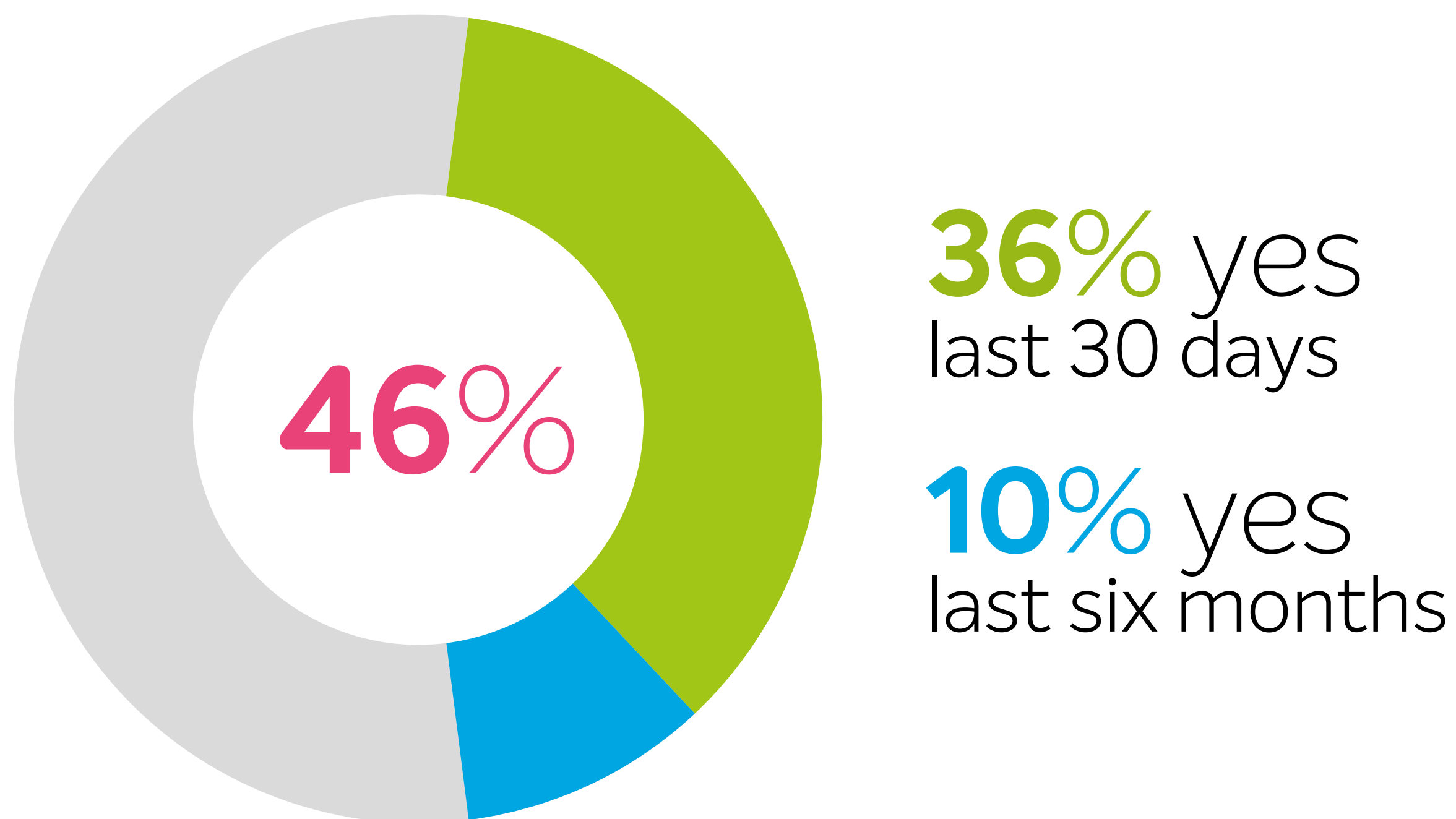


2023



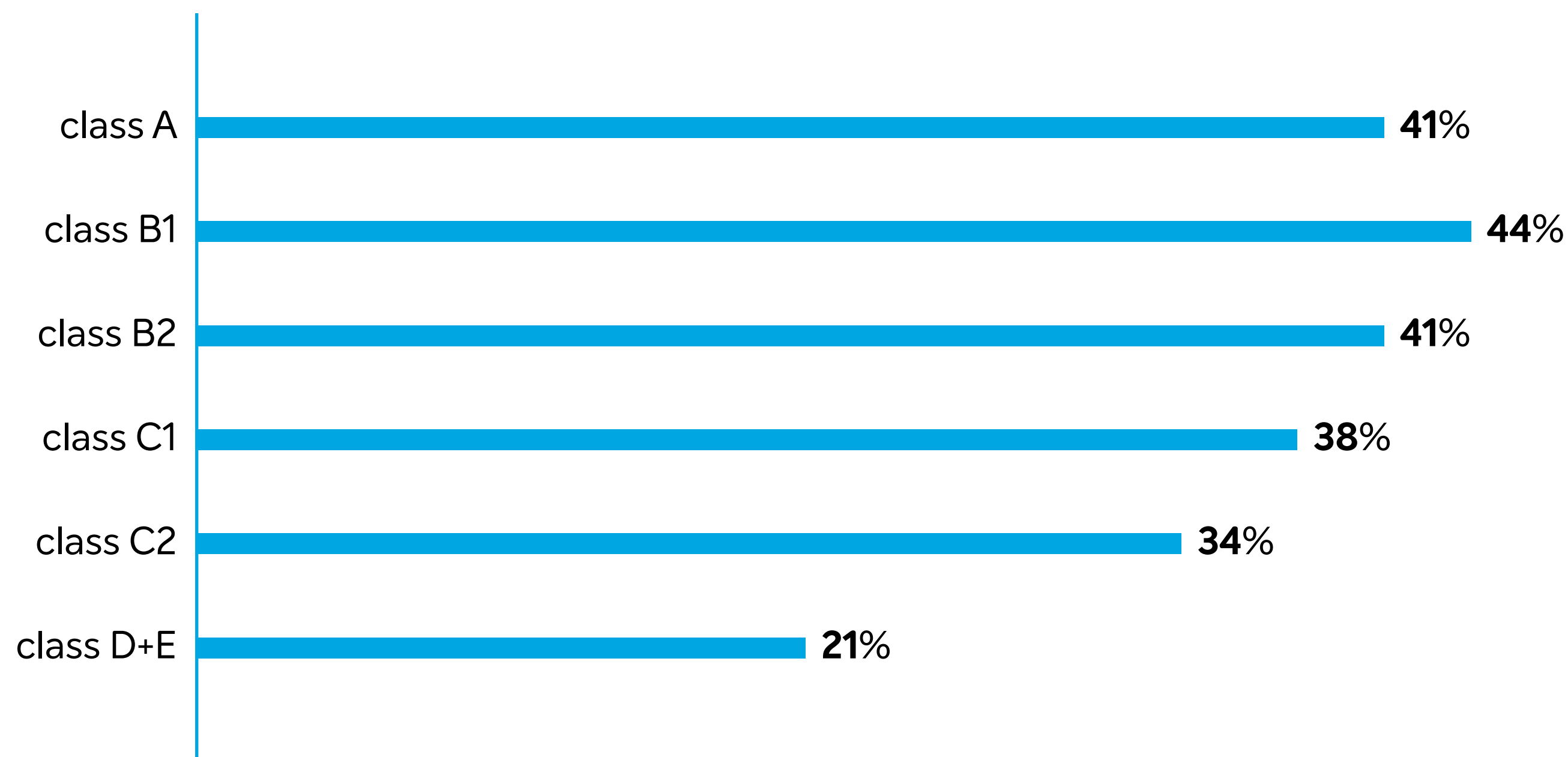
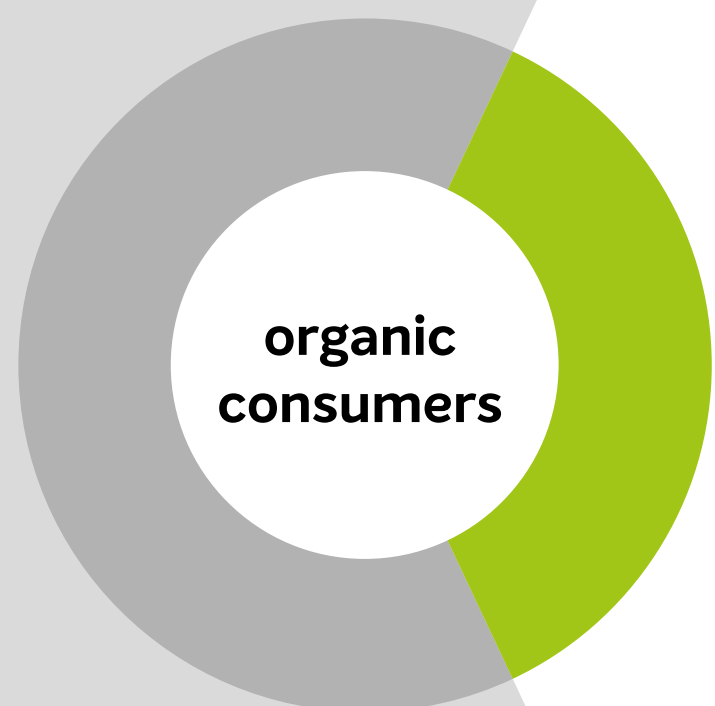
2021

Have you consumed organic products in the last six months?



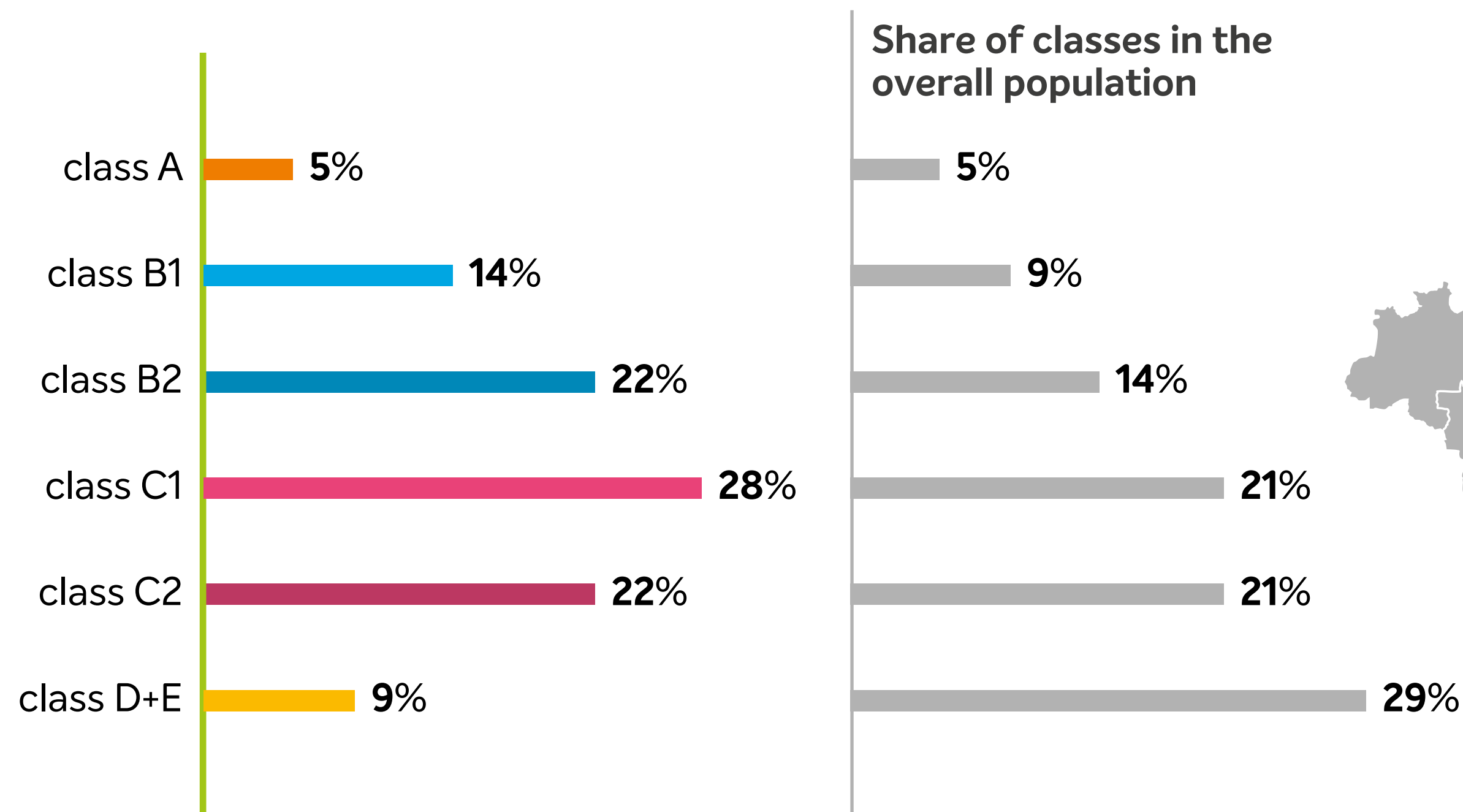
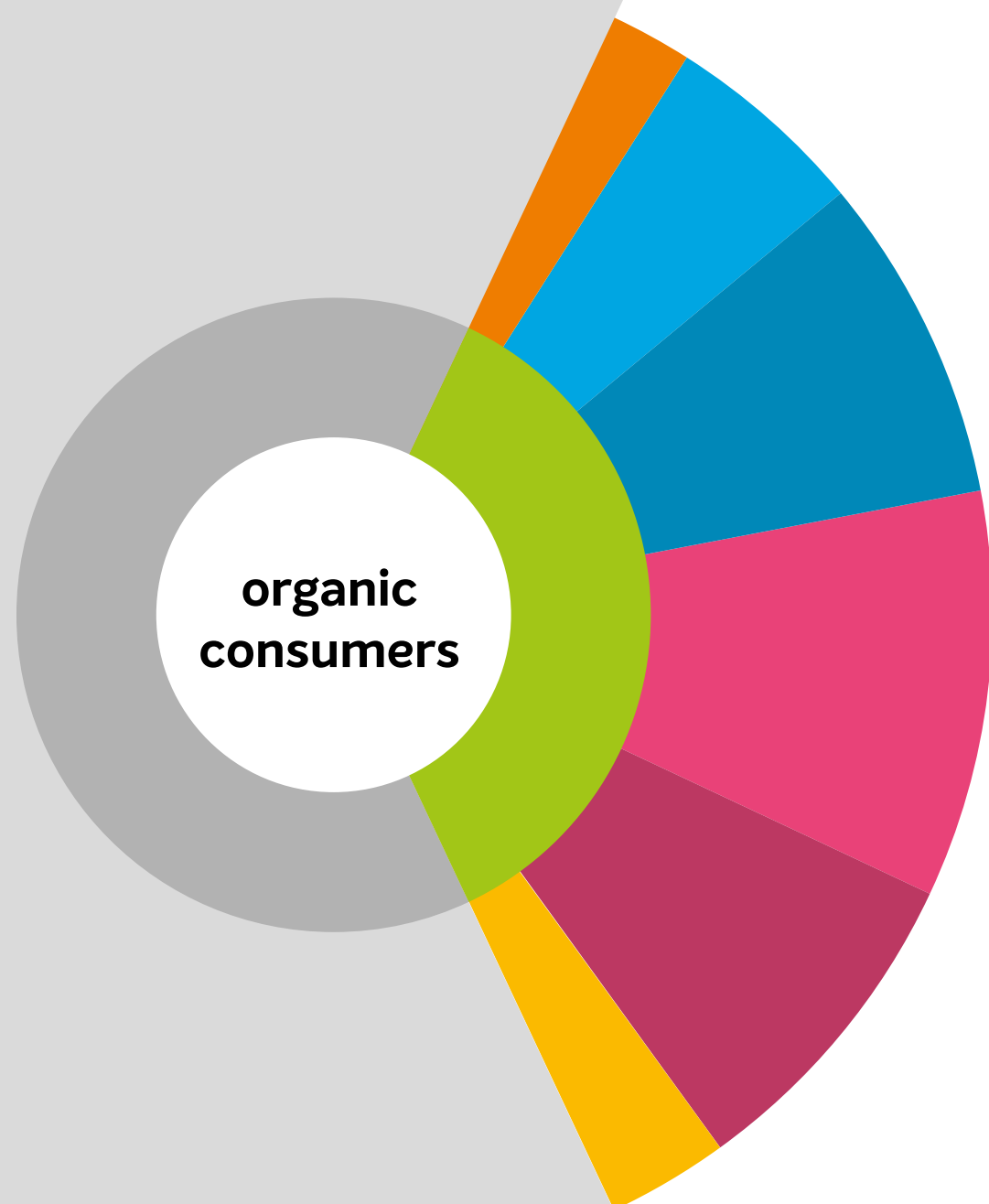
Consumption of organic products in the last 30 days

By social class



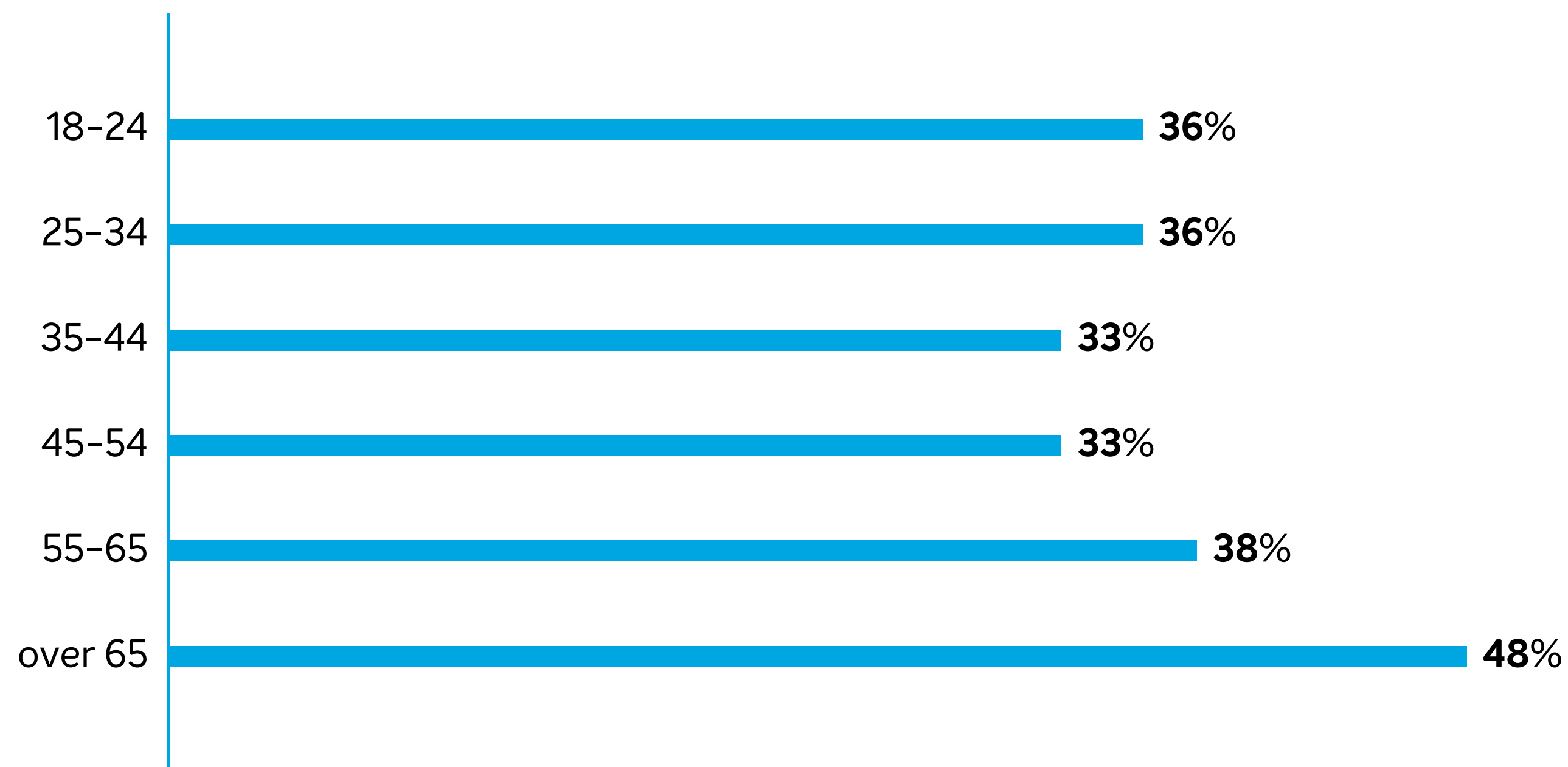
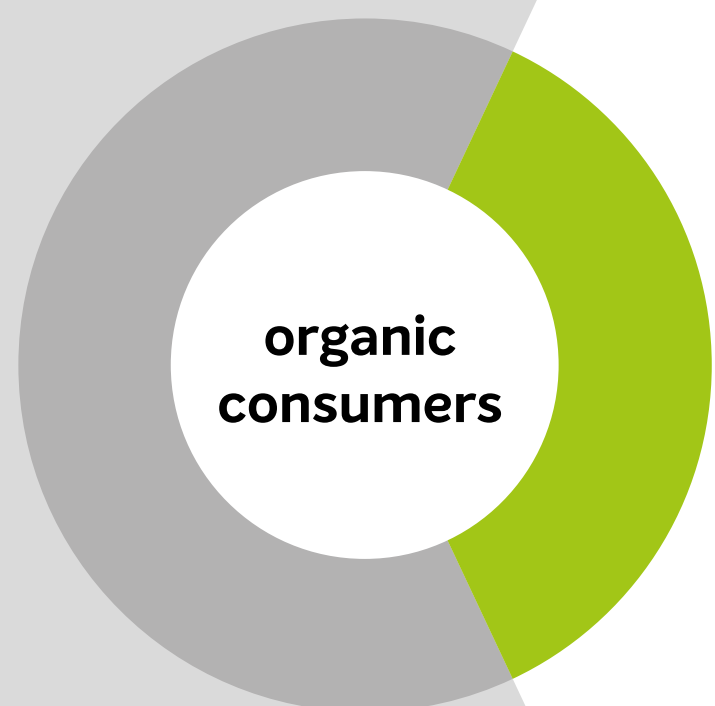
Consumption of organic products in the last 30 days

Distribution of the 36% who consume organic products by social class



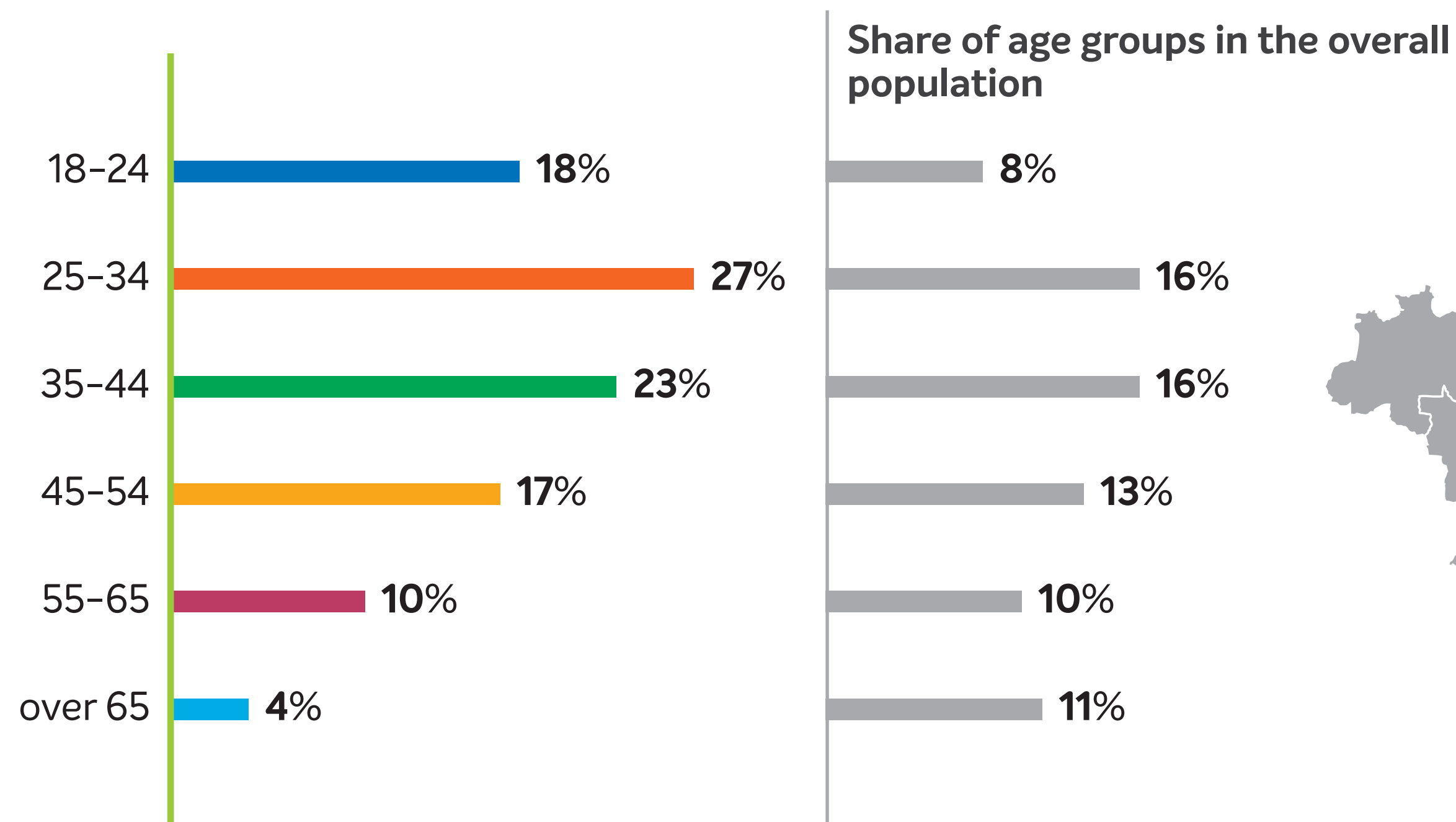
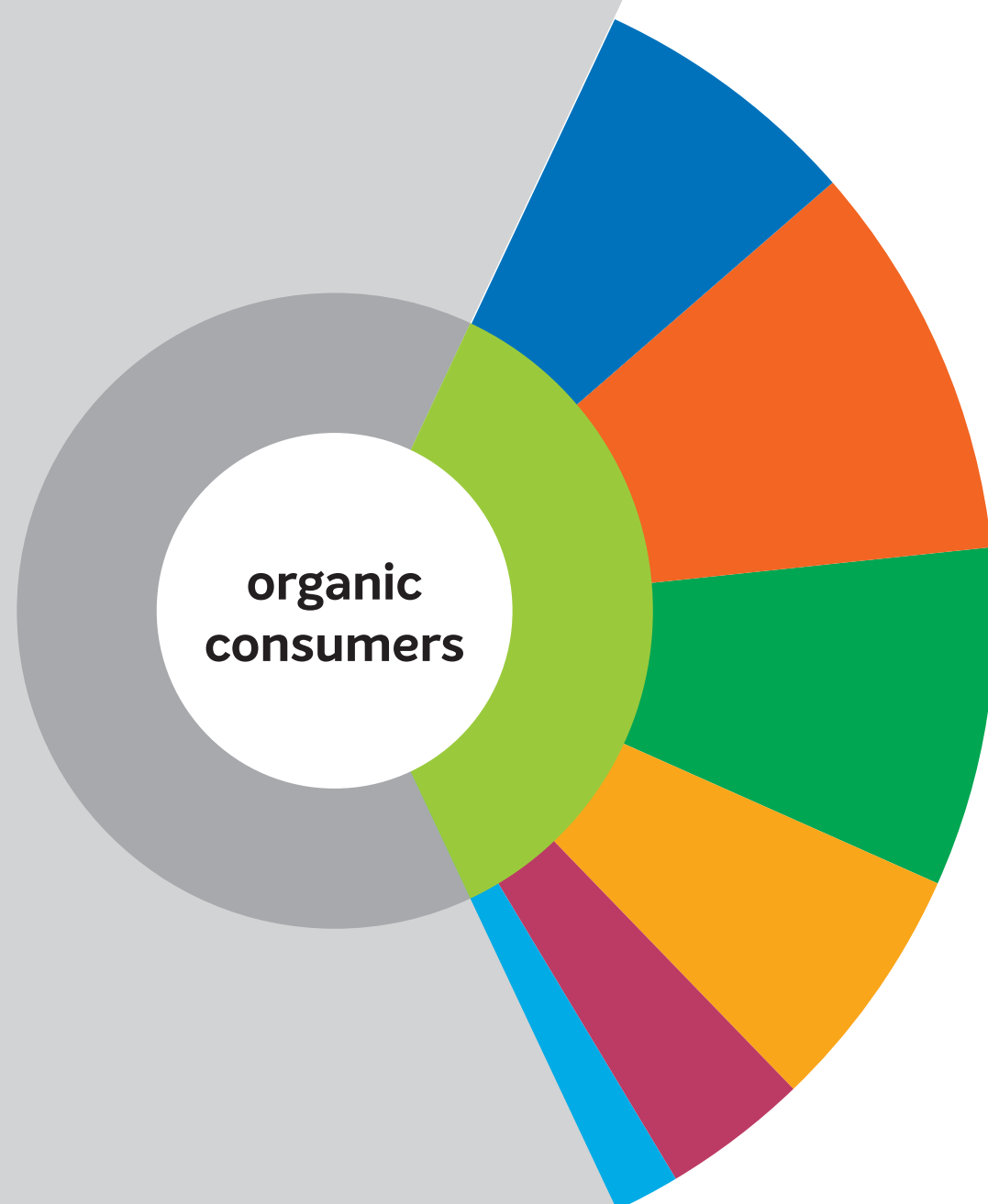
Consumption of organic products in the last 30 days

By age group



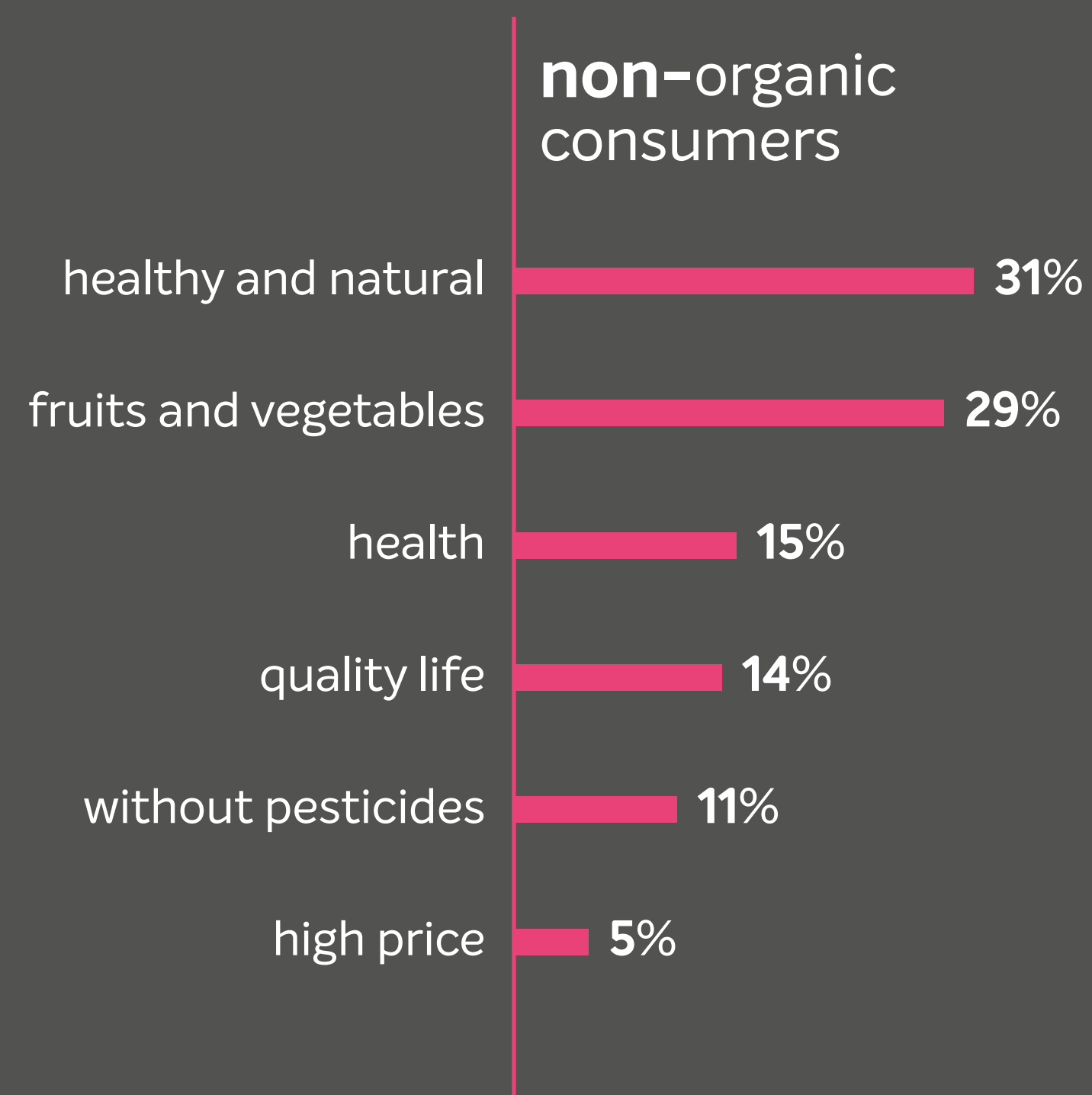
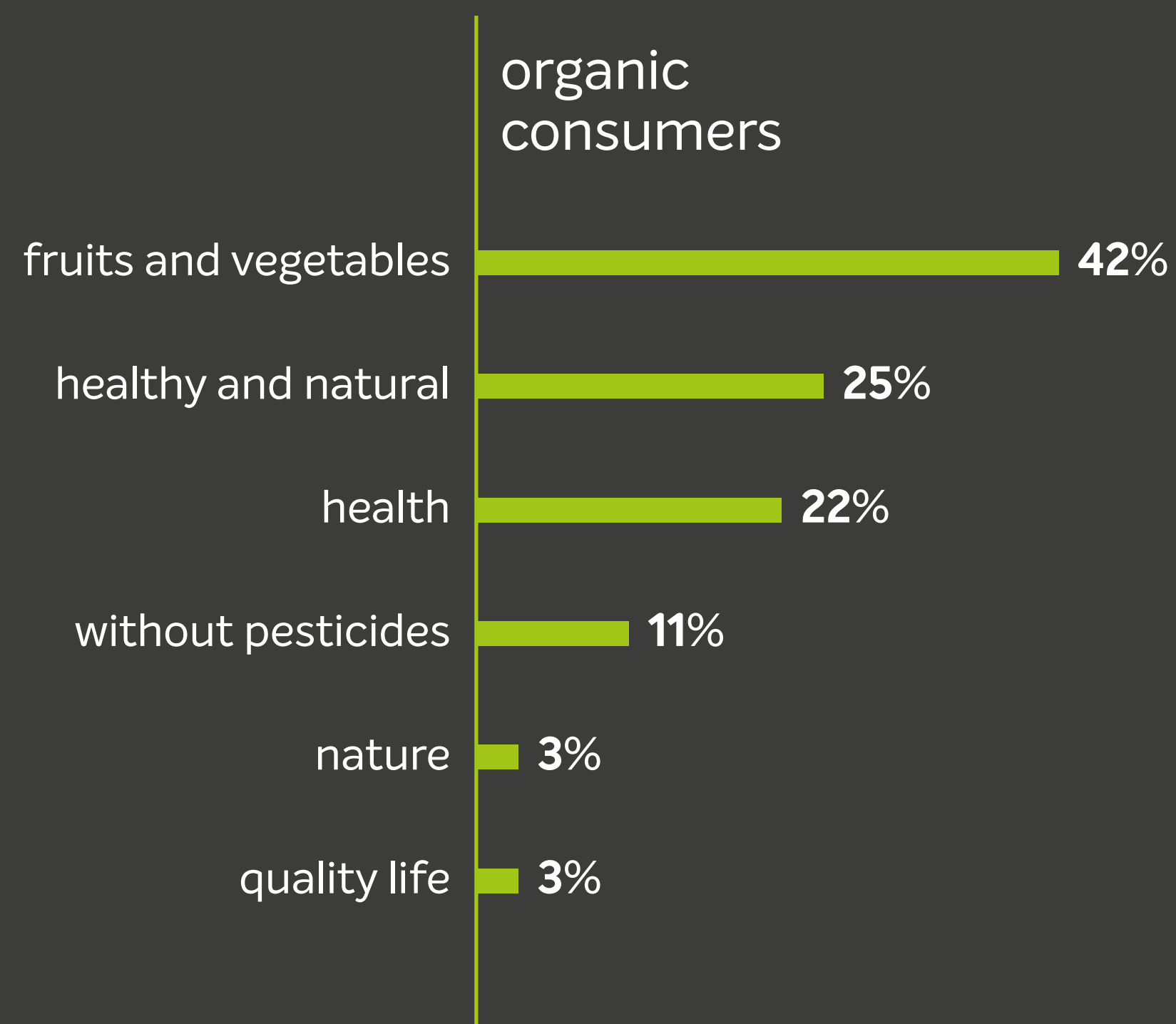
Consumption of organic products in the last 30 days

Distribution of the 36% who consume organic products by age group

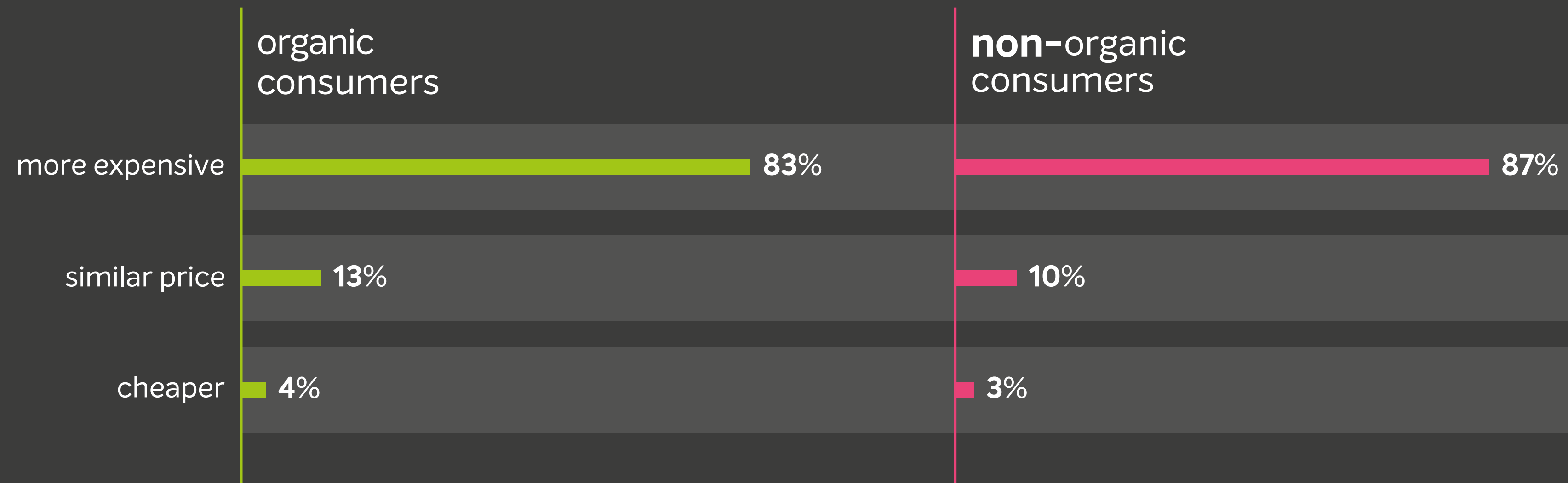


The first thing that comes to mind when hearing about an organic product

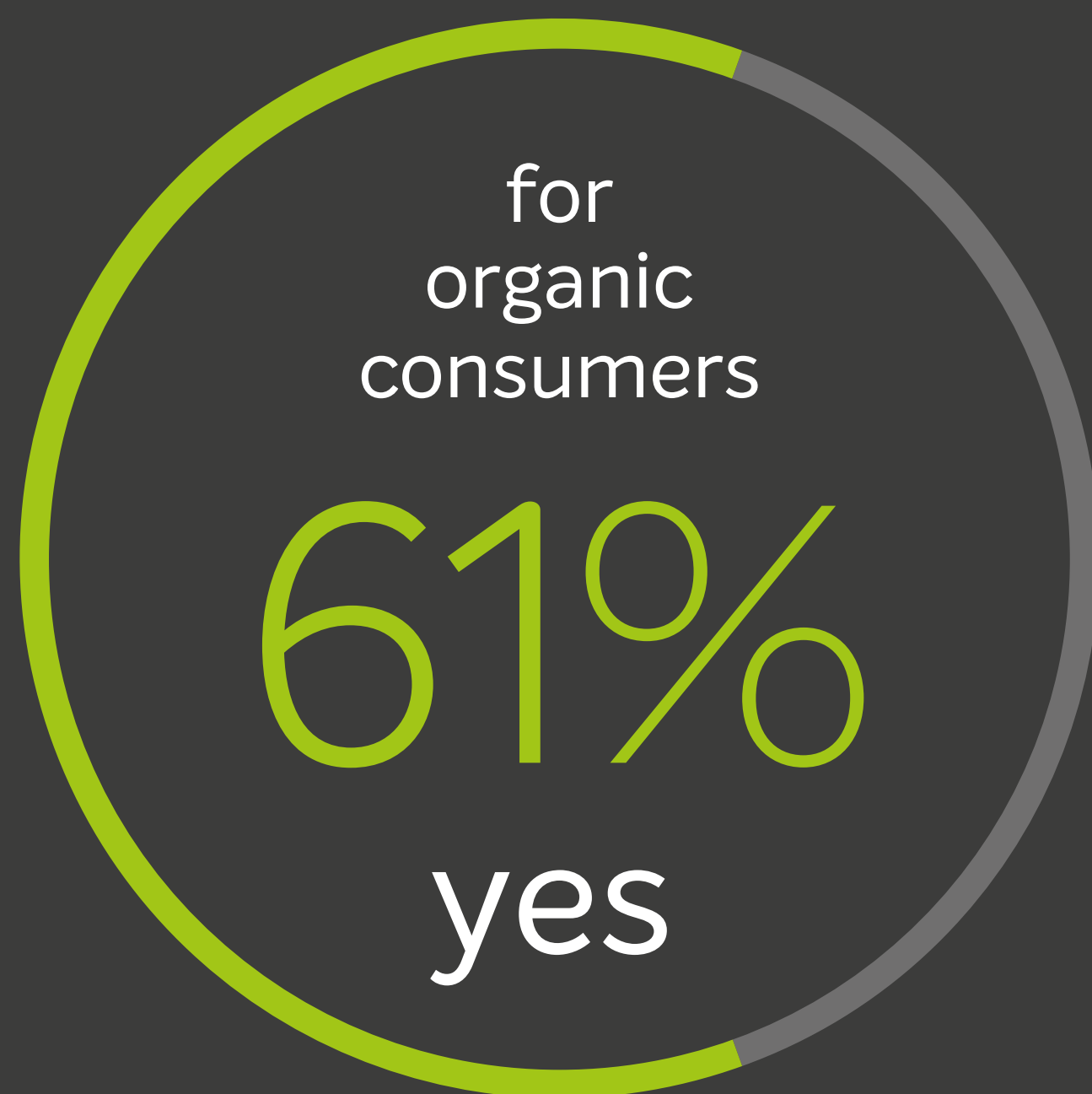
multiple answers



How do you evaluate the prices of organic products compared to non-organic products?



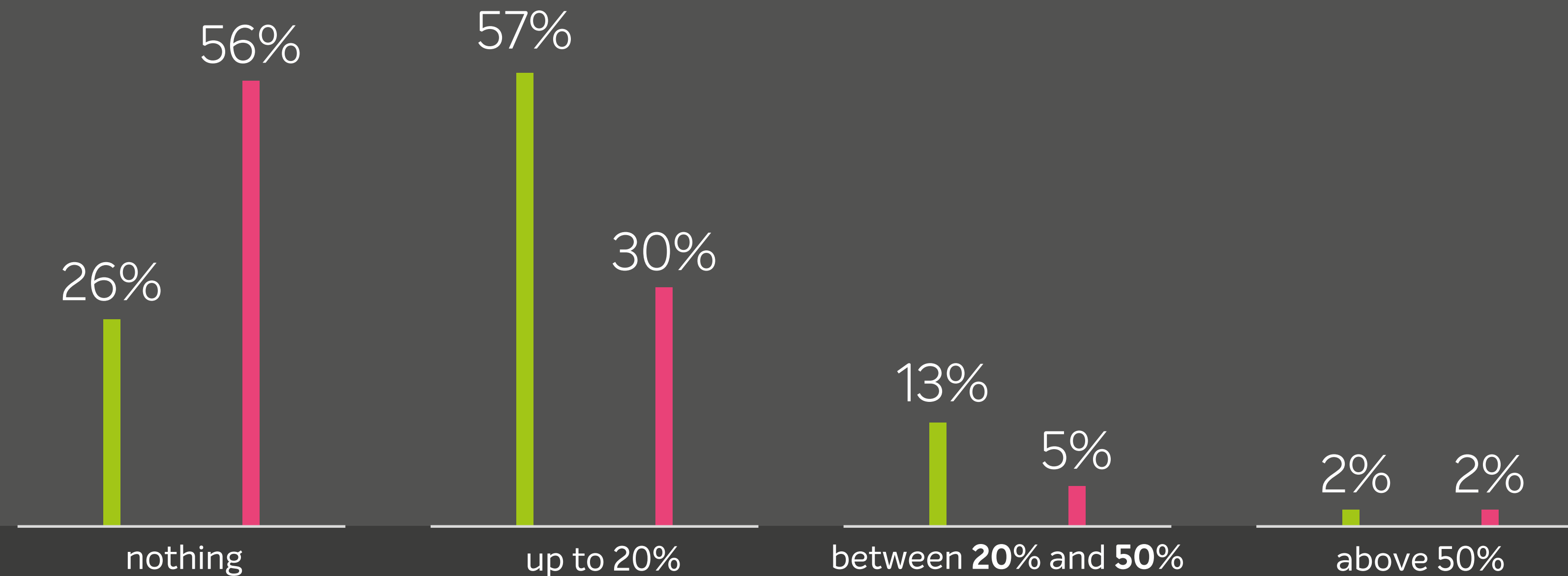
For those who consider organic products more expensive:
Do you believe that the price difference
in organic products is justified?



**rationale for those
who answered yes**

- production without pesticides
- product quality
- growing care
- growing cost
- slower farming
- lower yields
- healthy product
- production quality
- how the products is preserved

How much extra would you be willing to pay for an organic product?



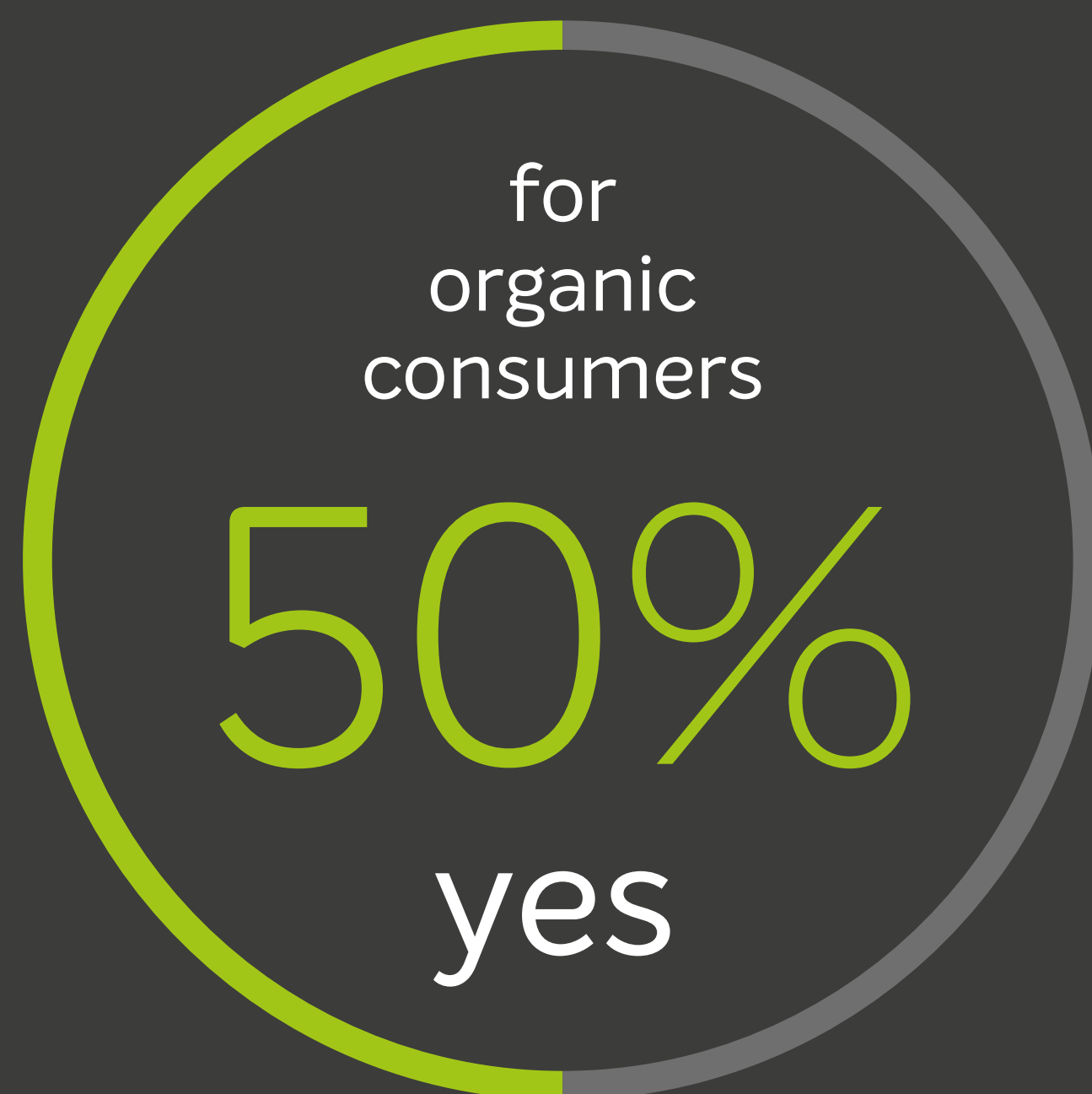
■ organic consumers
■ non-organic consumers

Is the type of packaging a decisive factor in the purchase?

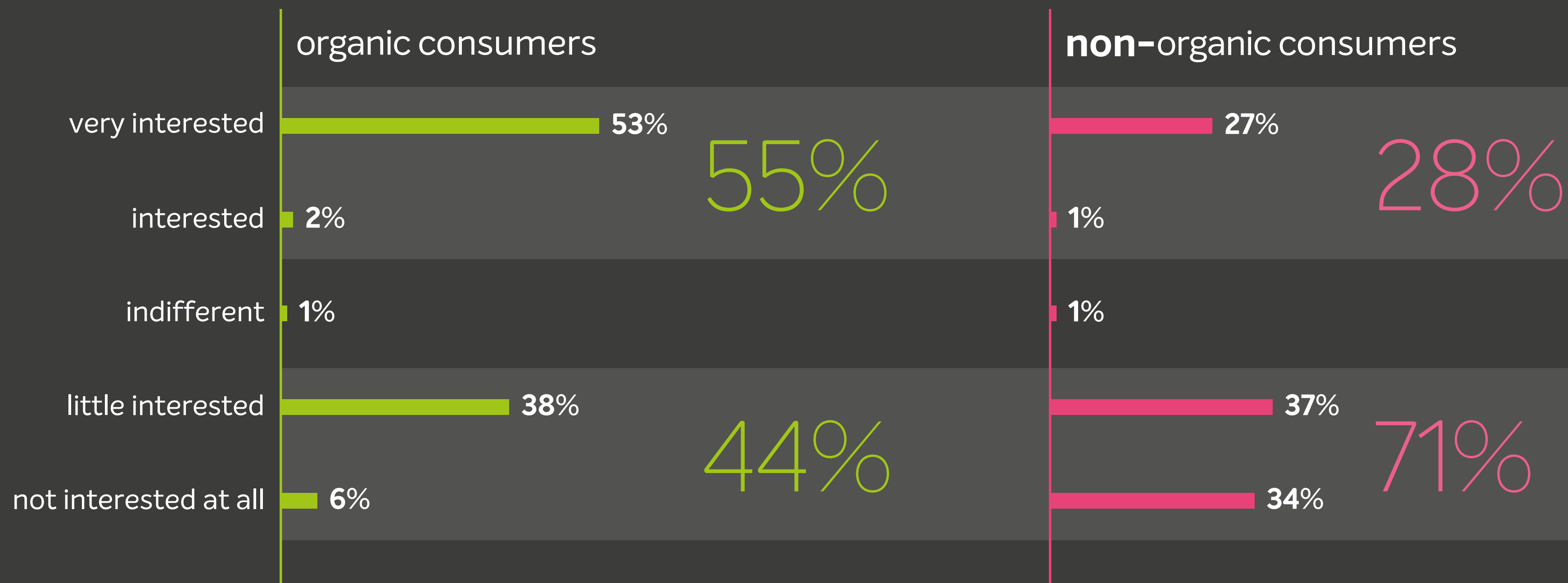
Looking to buy products from companies they care about with the type packaging.

That is not harmful to human health and to the environment.

That can be recycled, returnable or that has reverse logistics.

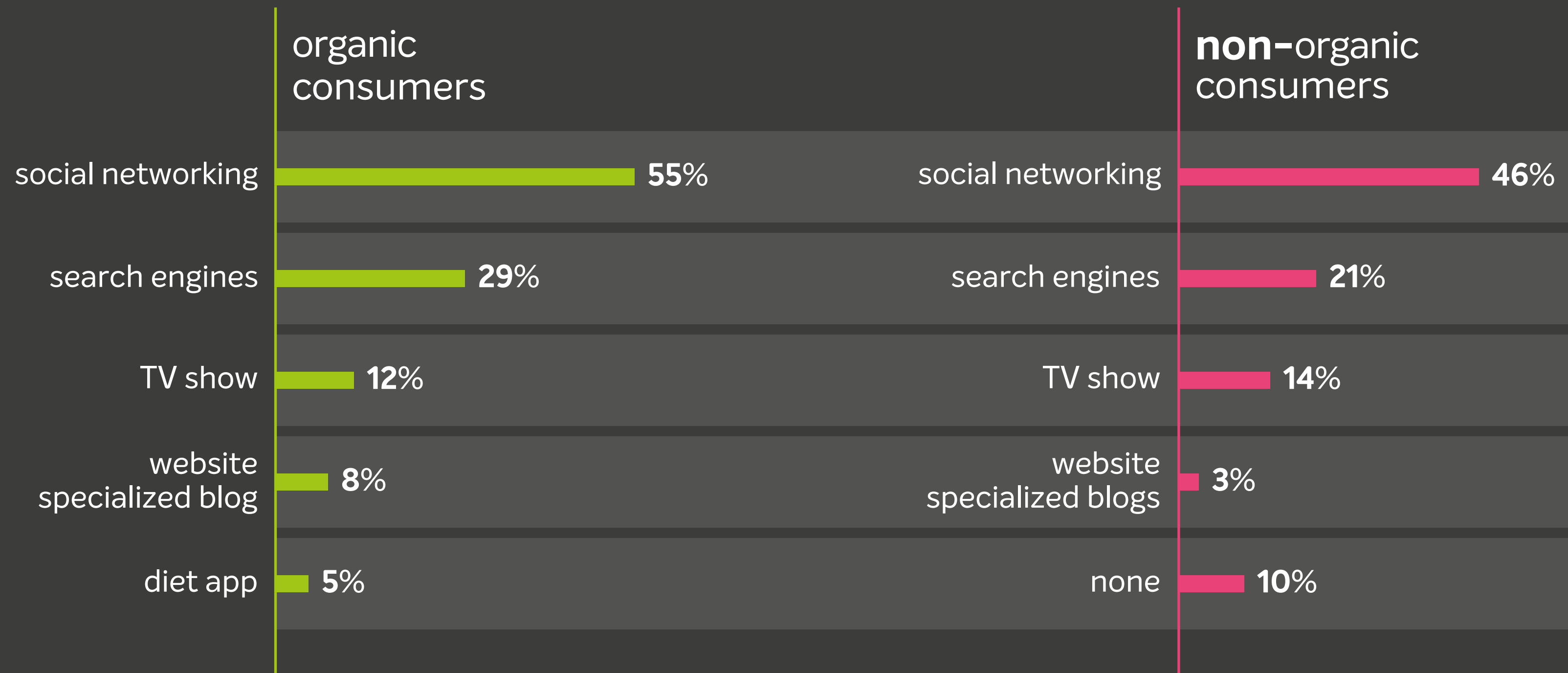


Interest in the topic **healthy eating**

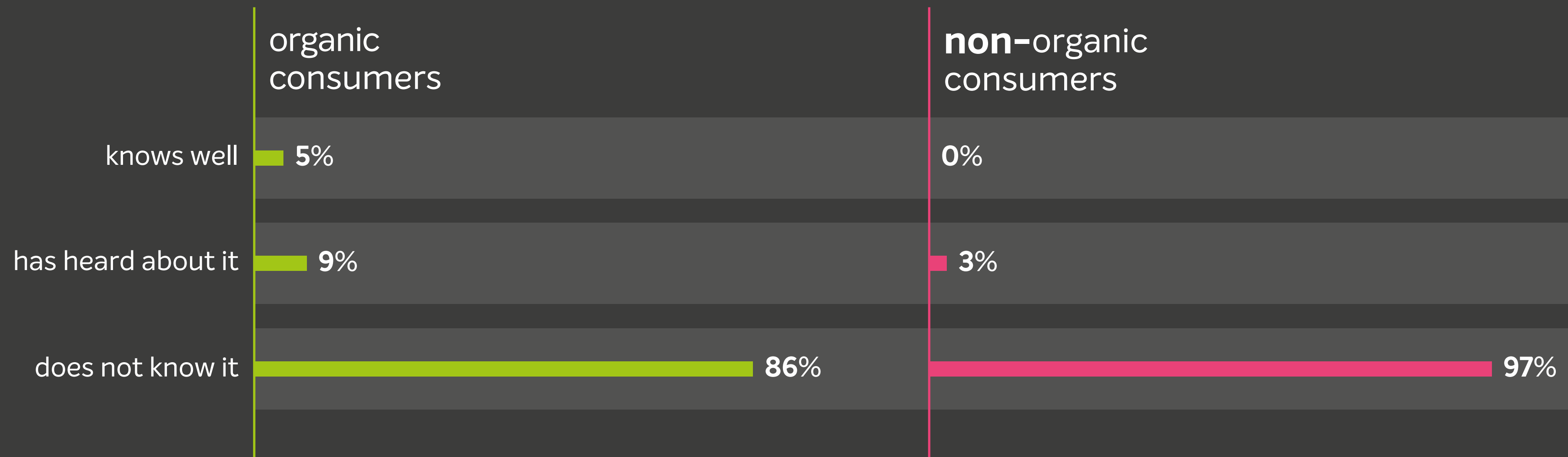


Sources of information on **healthy eating**

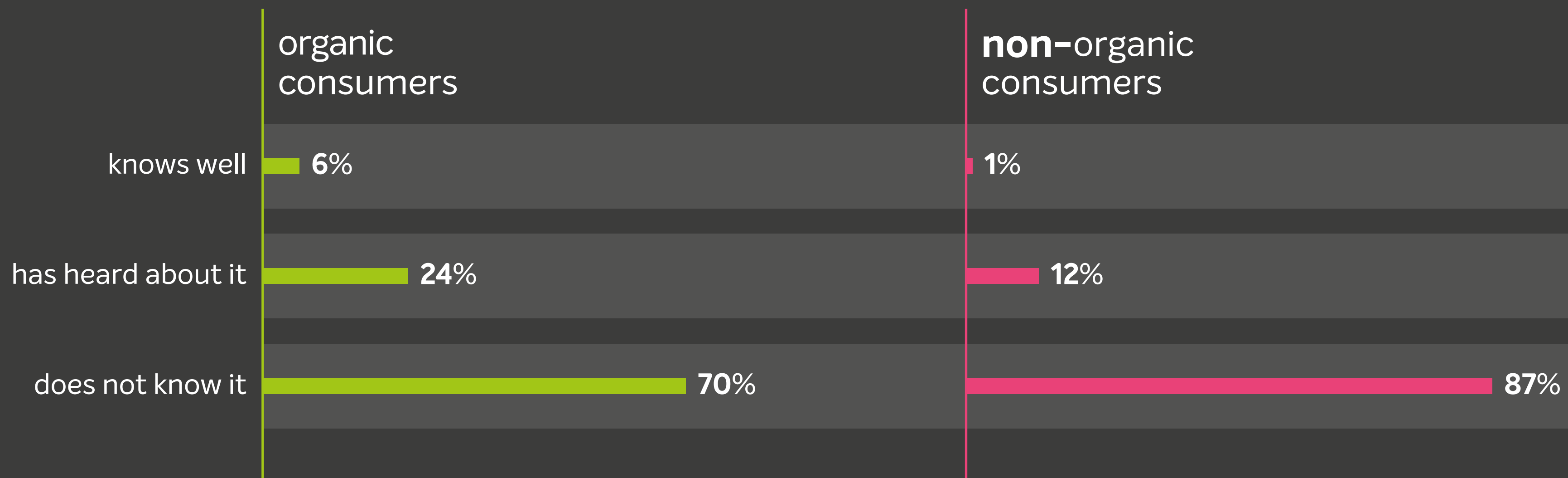
multiple answers



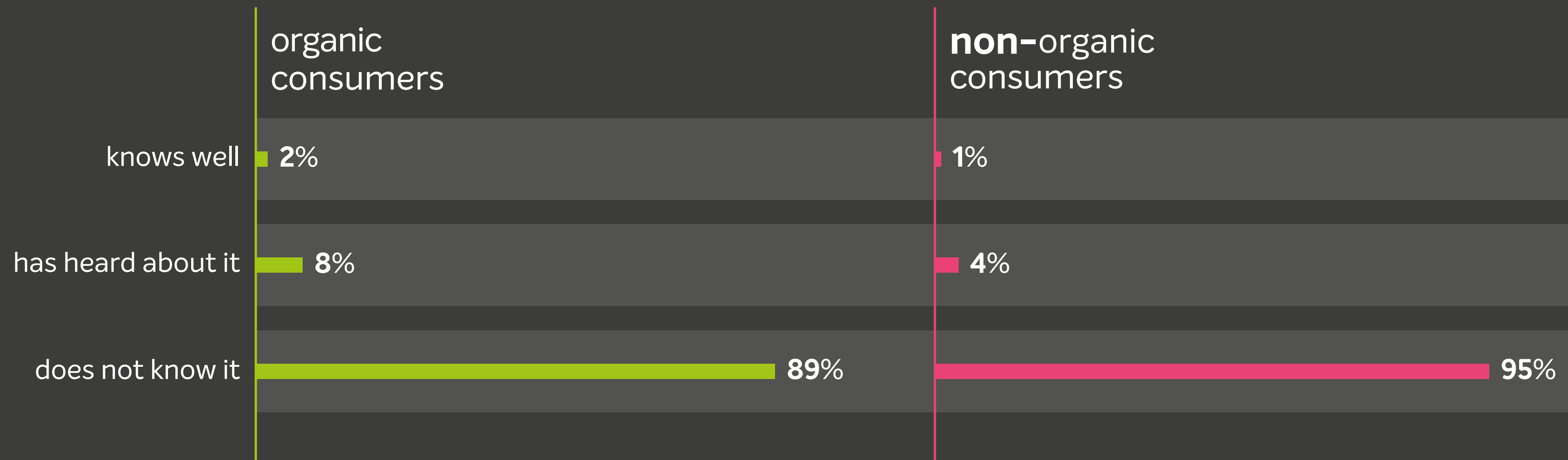
Know or have heard about **plant based**



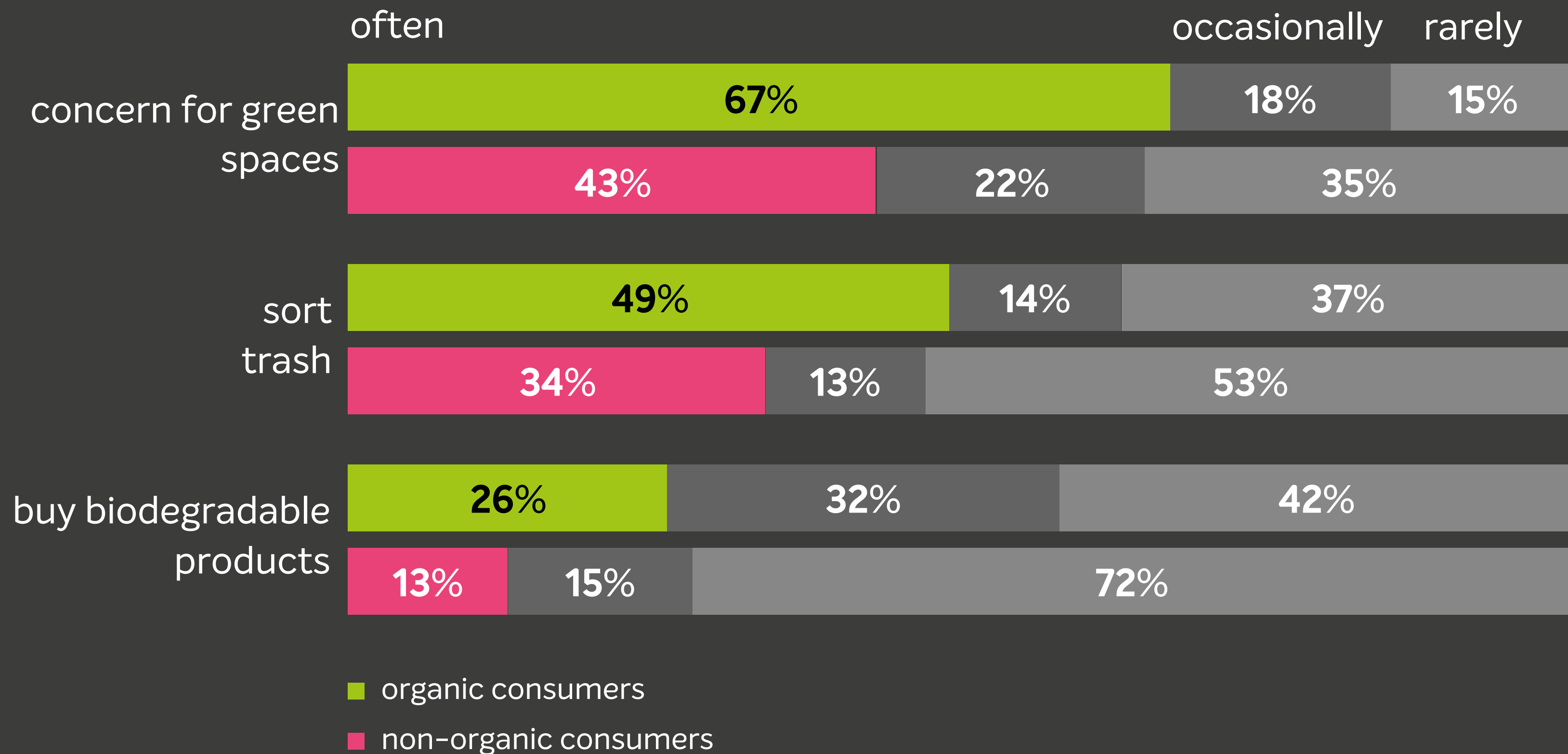
Know or have heard about **regenerative agriculture**



Know or have heard about **clean label**

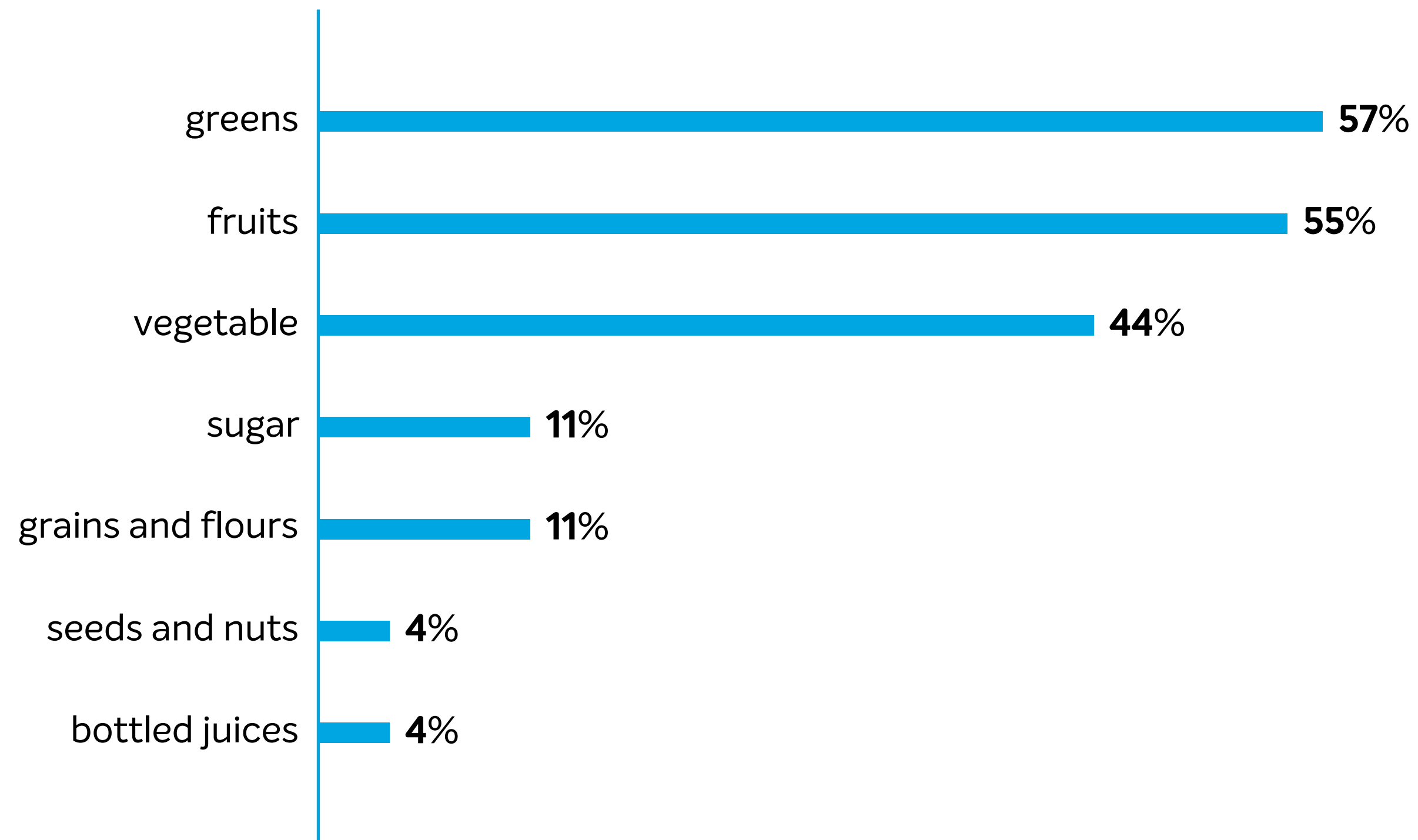
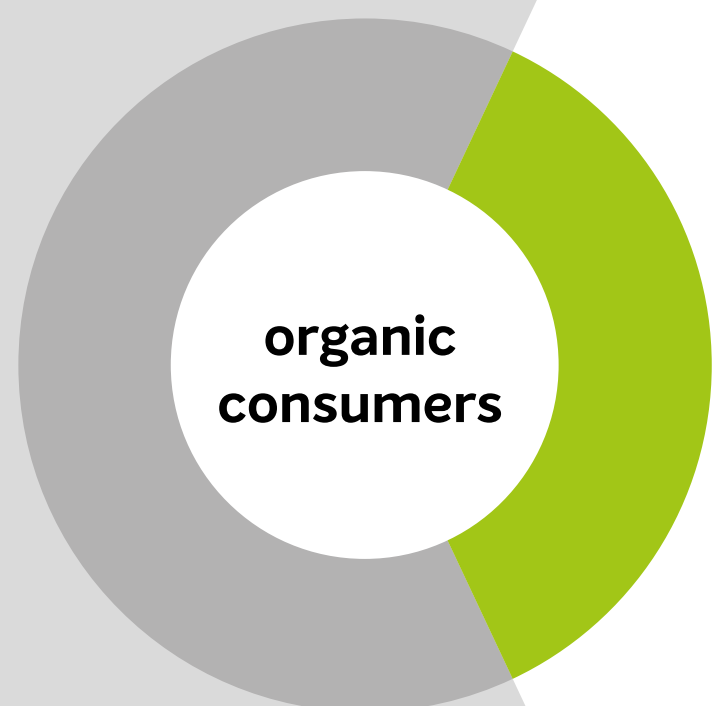


Frequency of sustainable actions



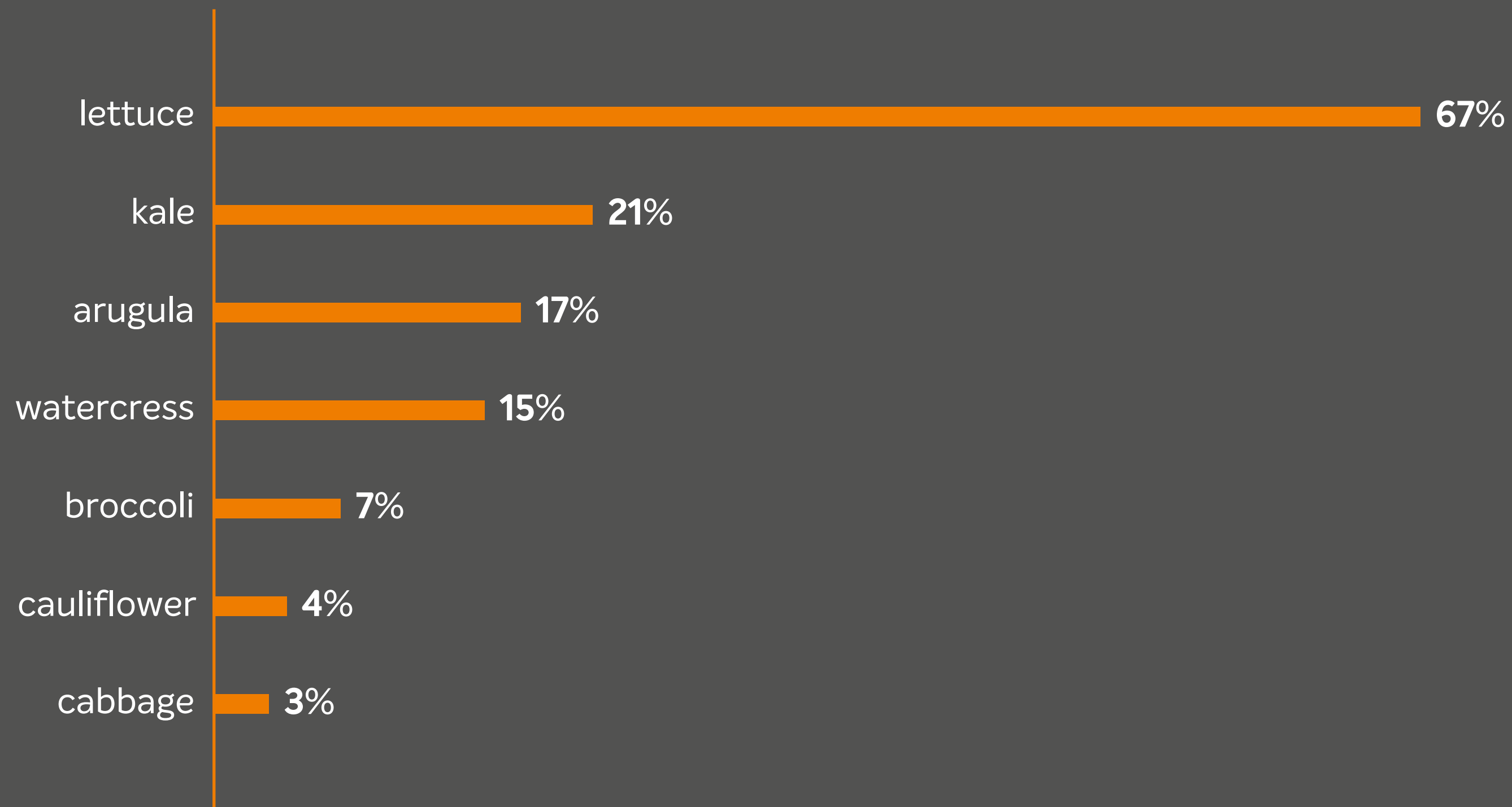
Most consumed organic products

multiple answers



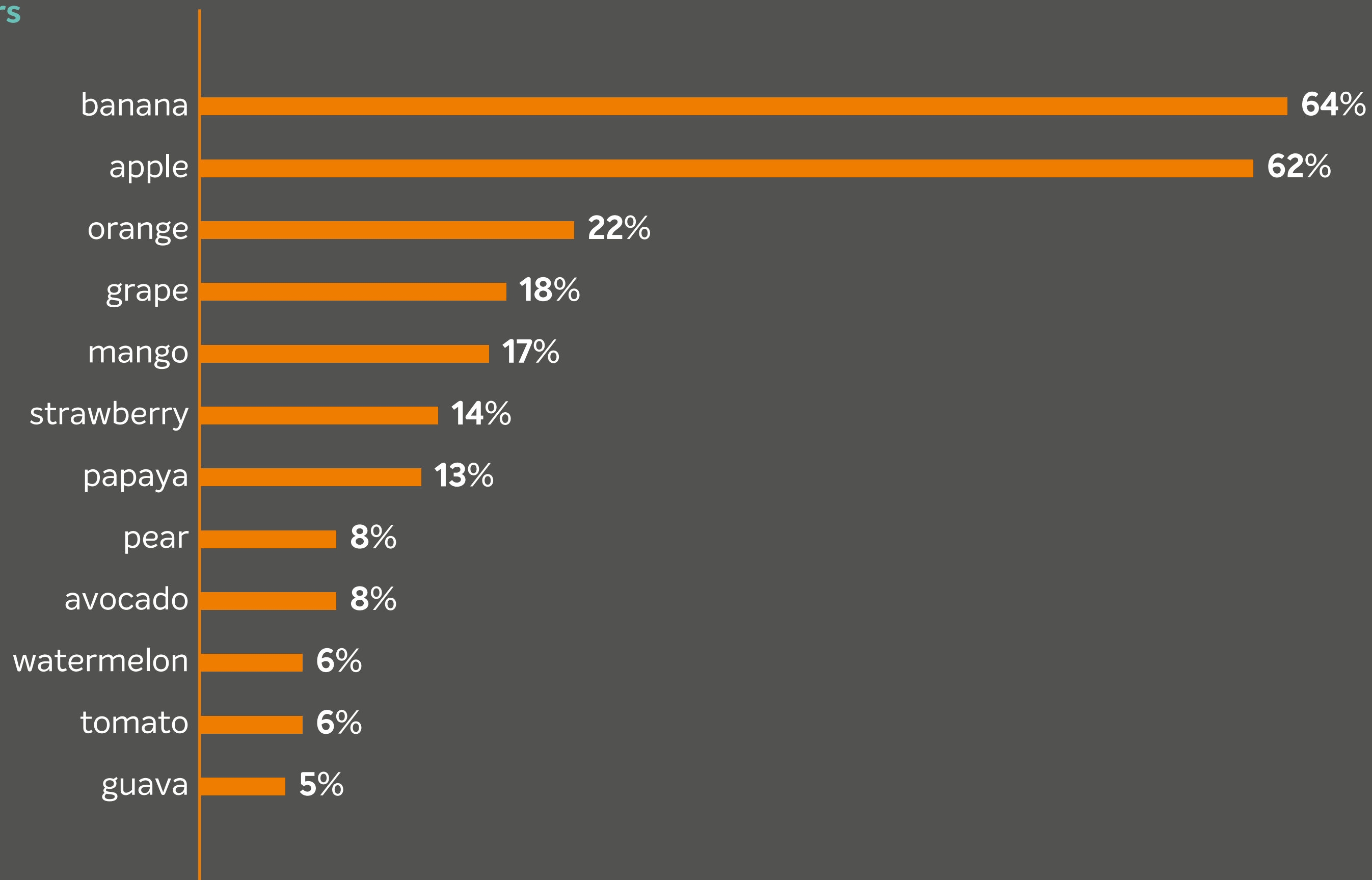
Most consumed organic greens

multiple answers



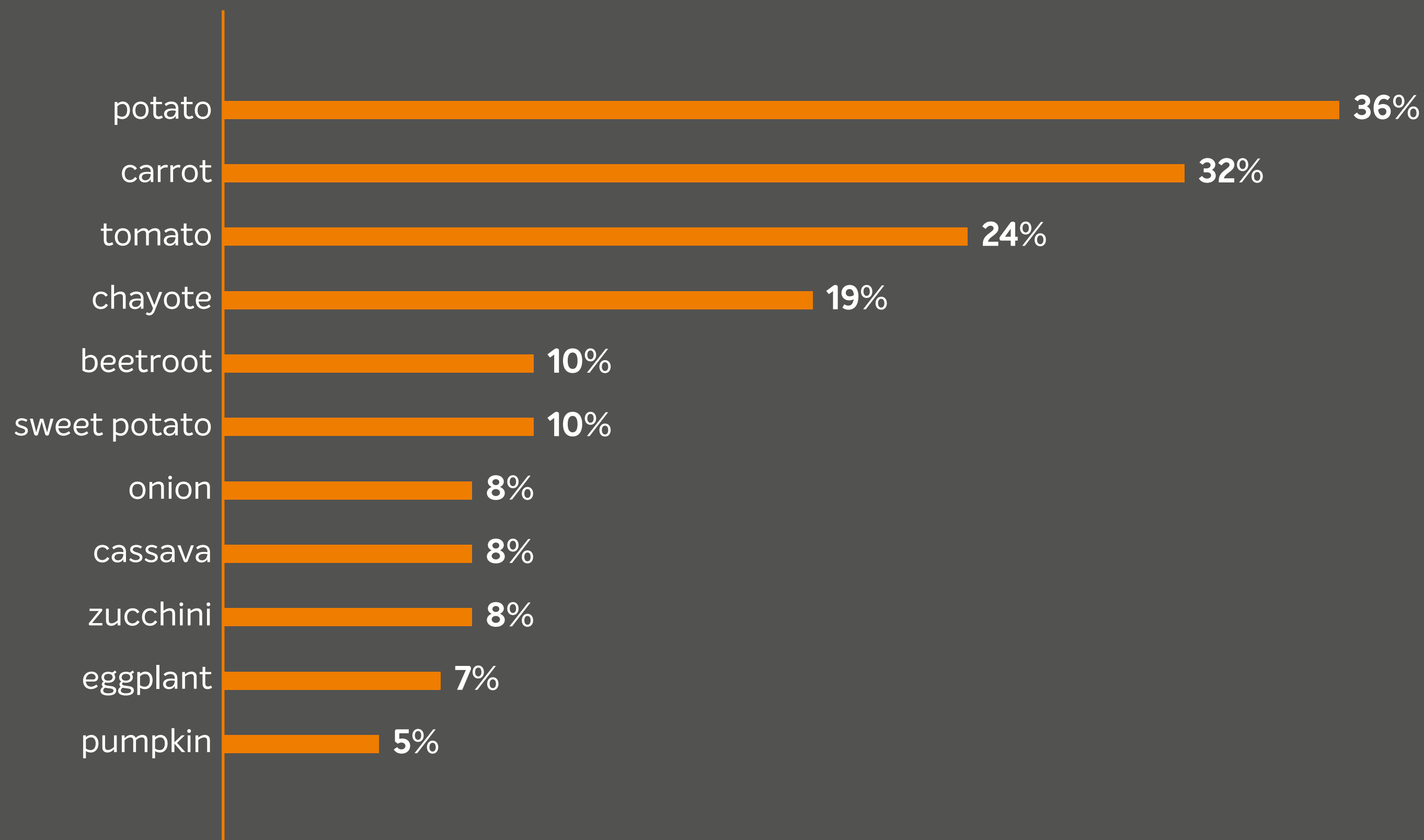
Most consumed organic fruits

multiple answers



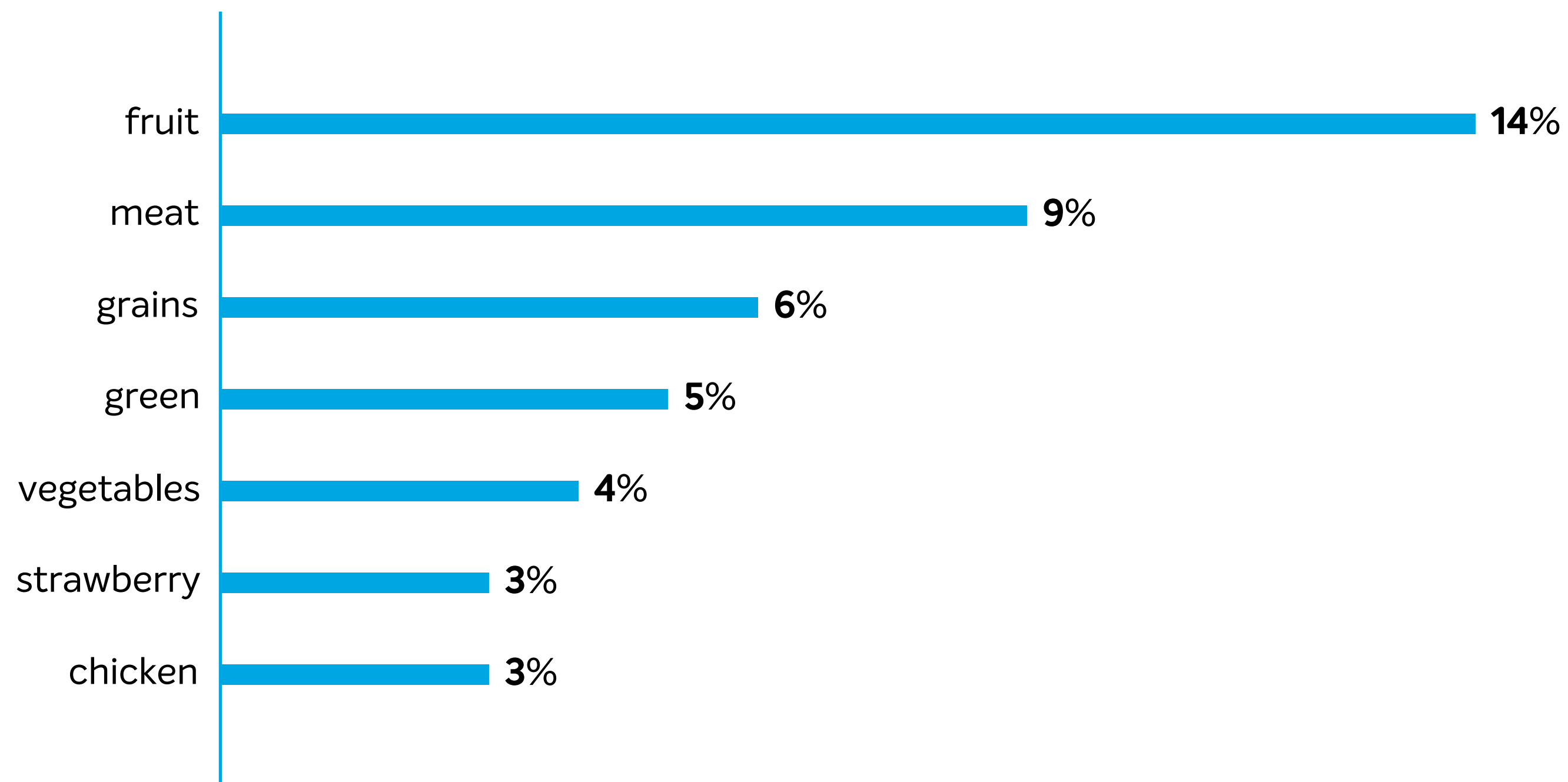
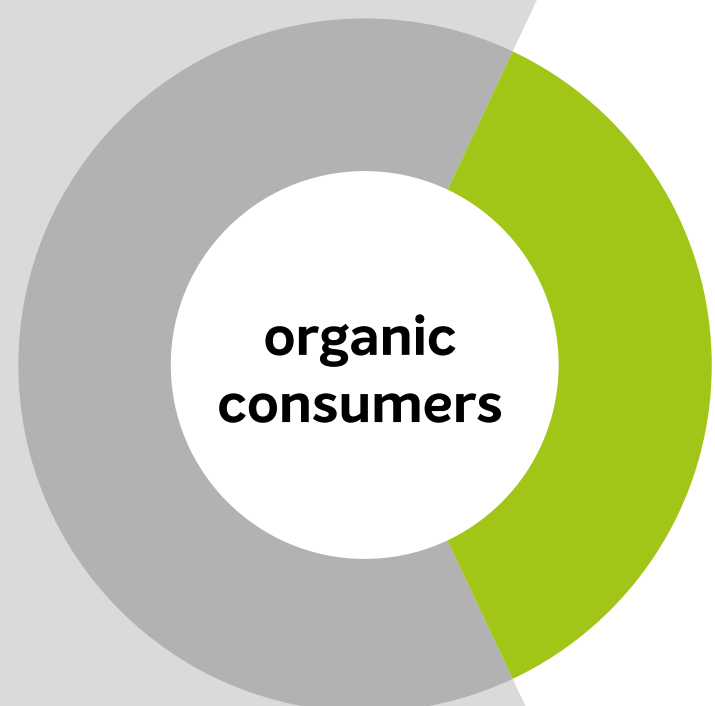
Most consumed organic vegetables

multiple answers

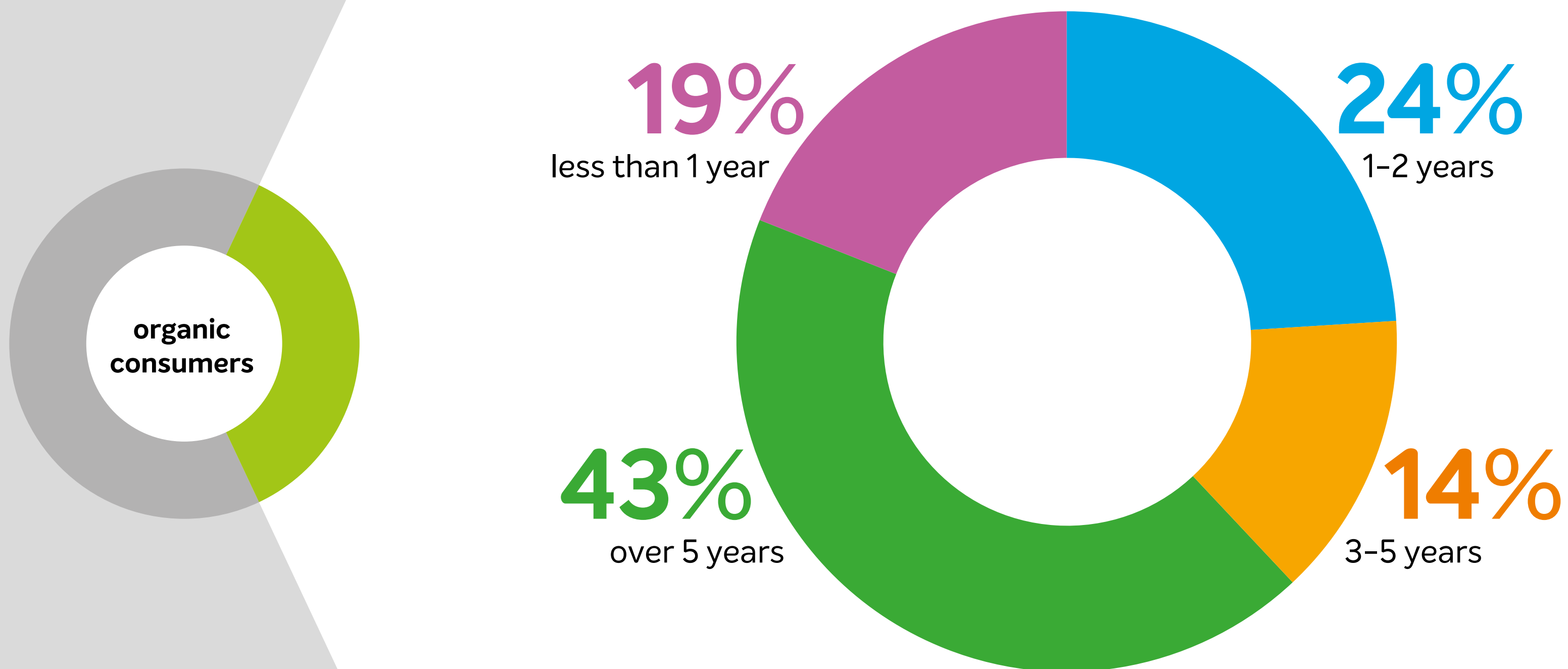


Organic products that are harder to find

multiple answers

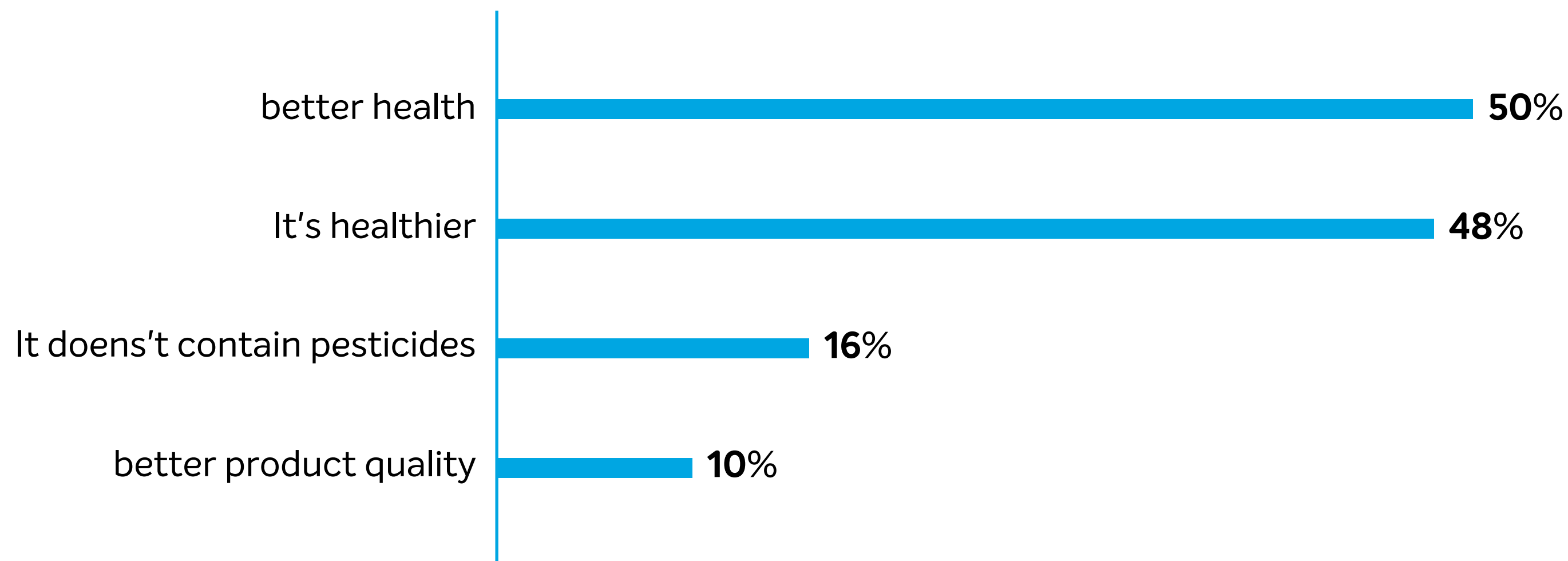
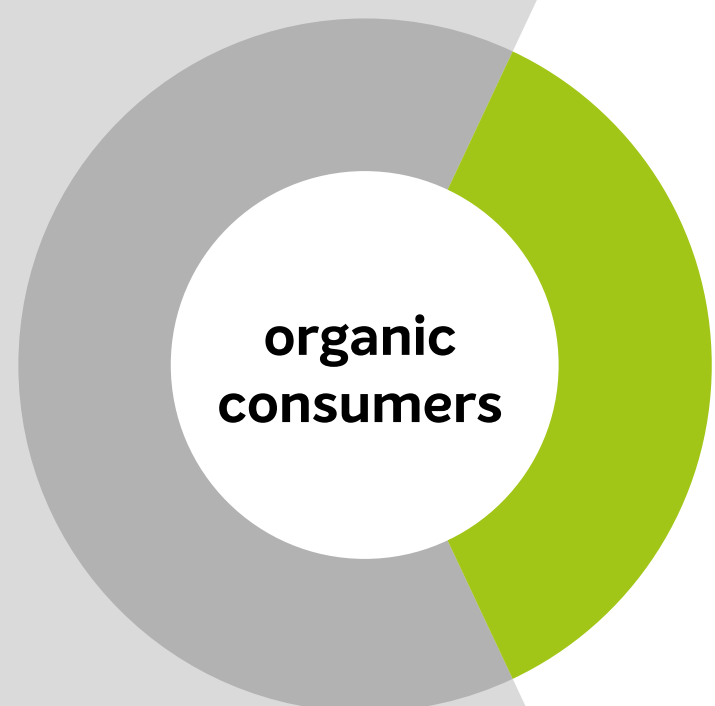


How long have you consumed organic products?



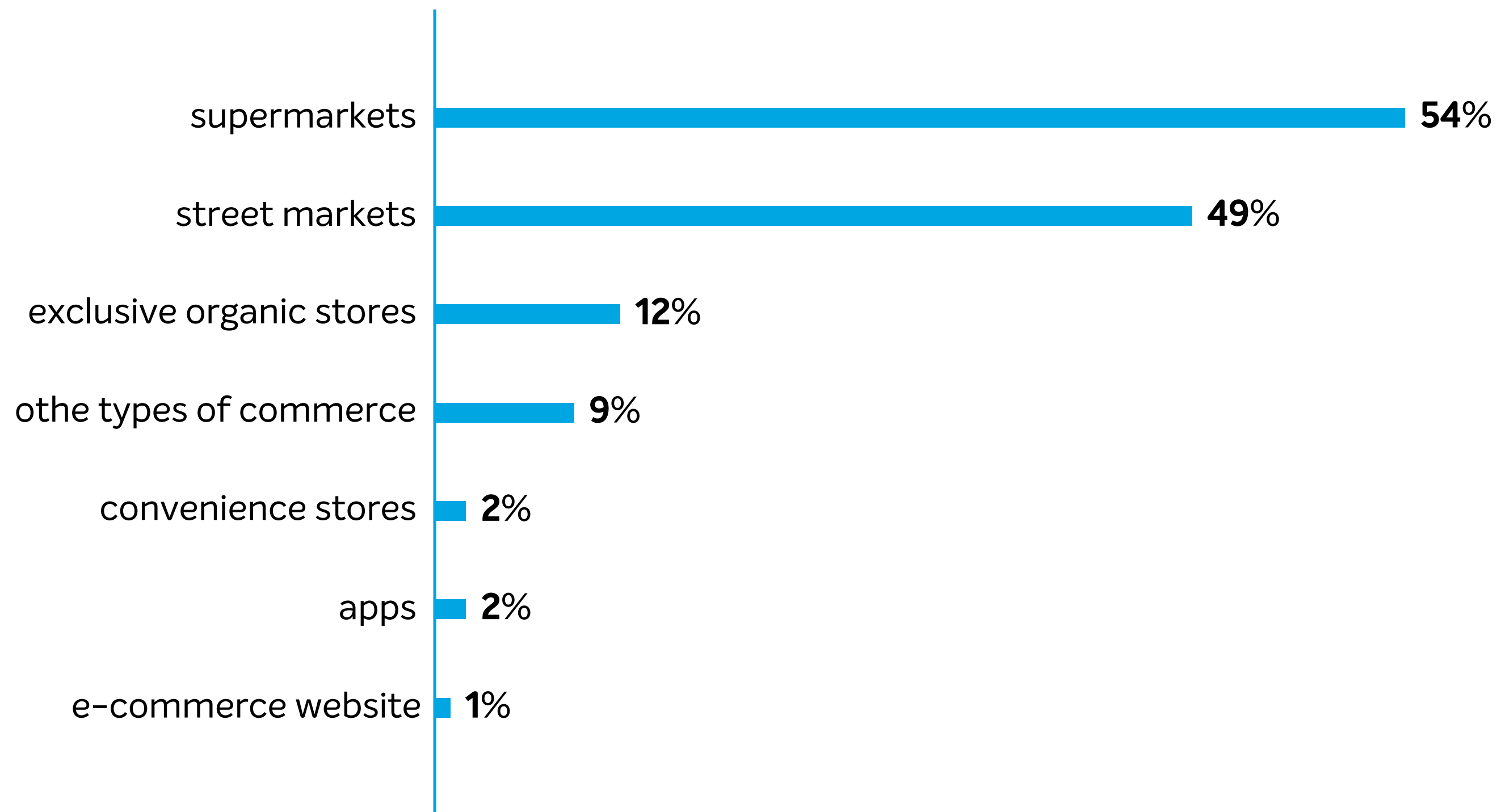
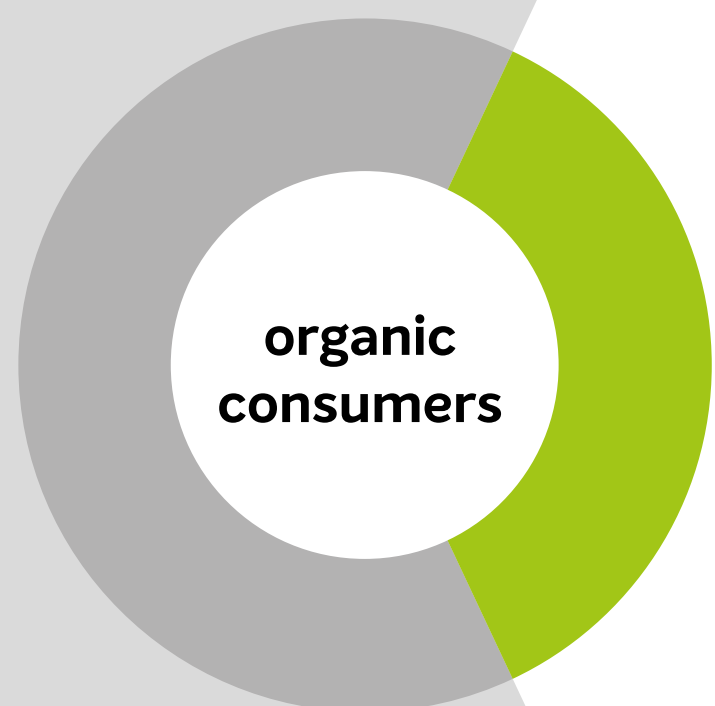
Reasons to consume organic products

multiple answers

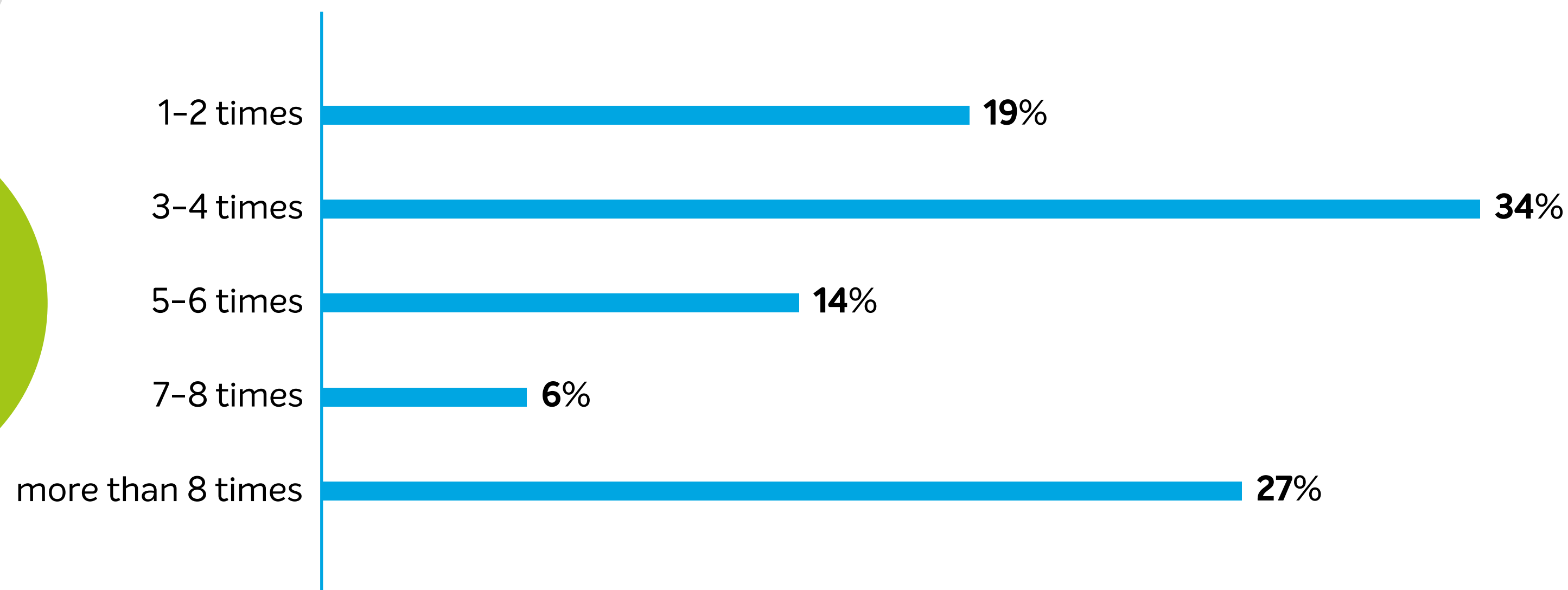
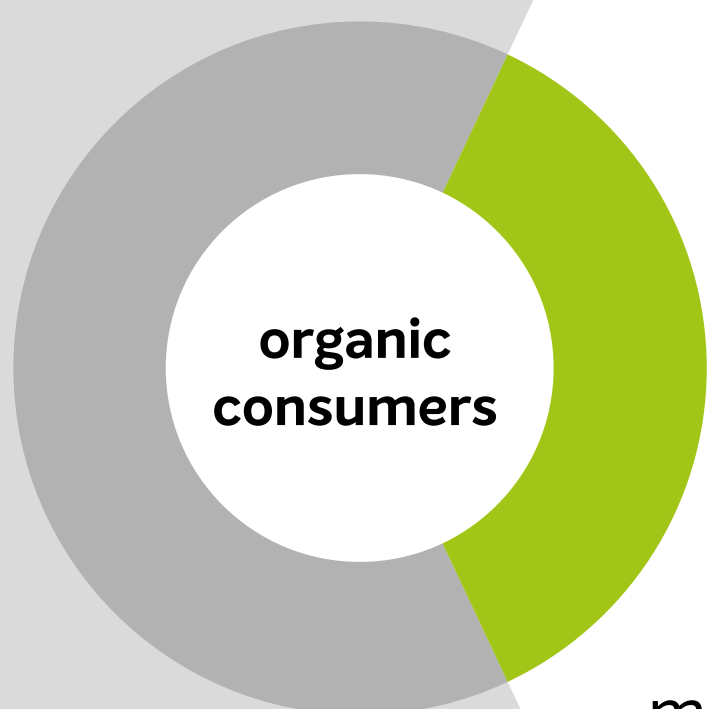


Preferred points of purchase for organic products

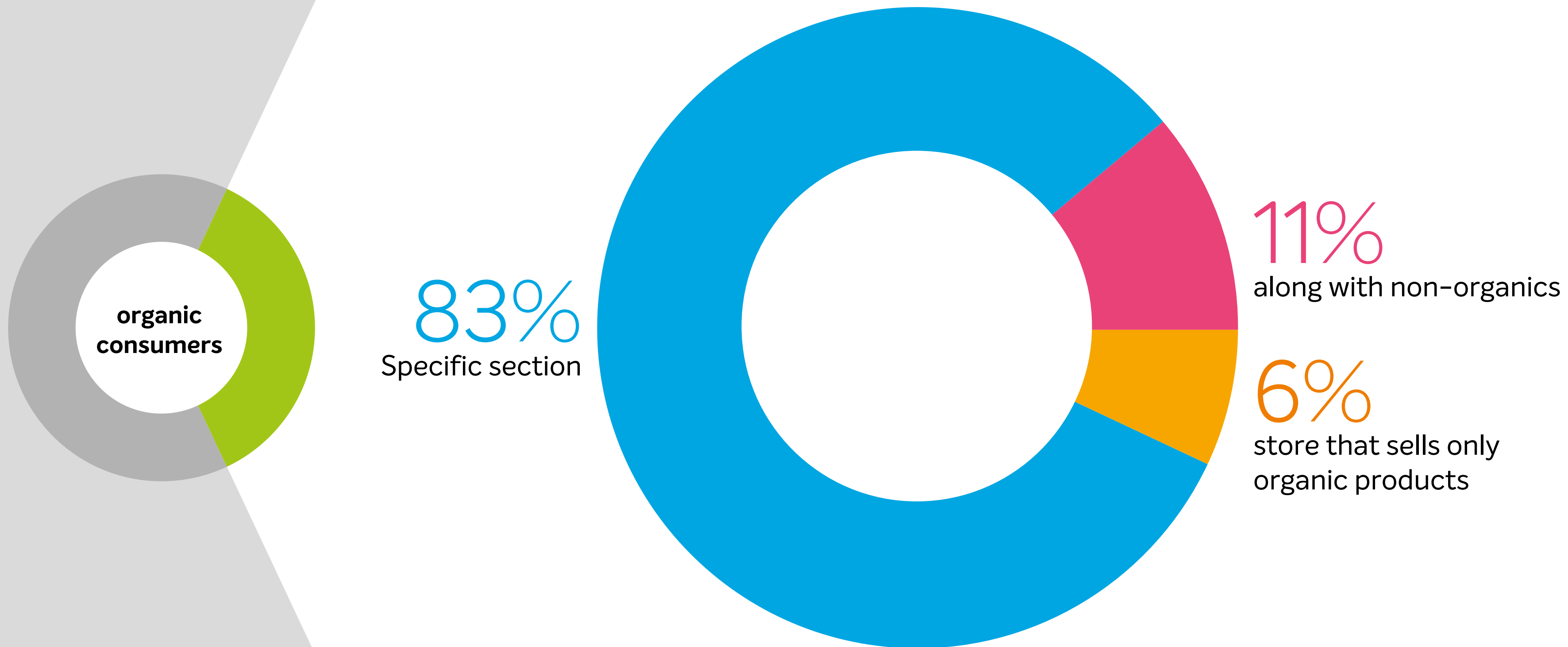
multiple answers



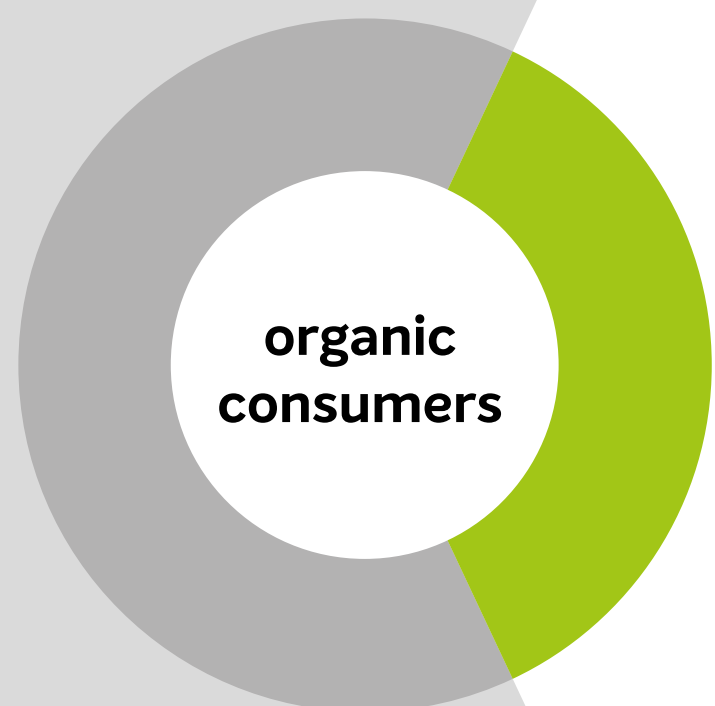
How often do you **purchase** organic products in a month



Preference for how organic products are displayed in the store



Does it matter to you whether or not
it's a local organic product?



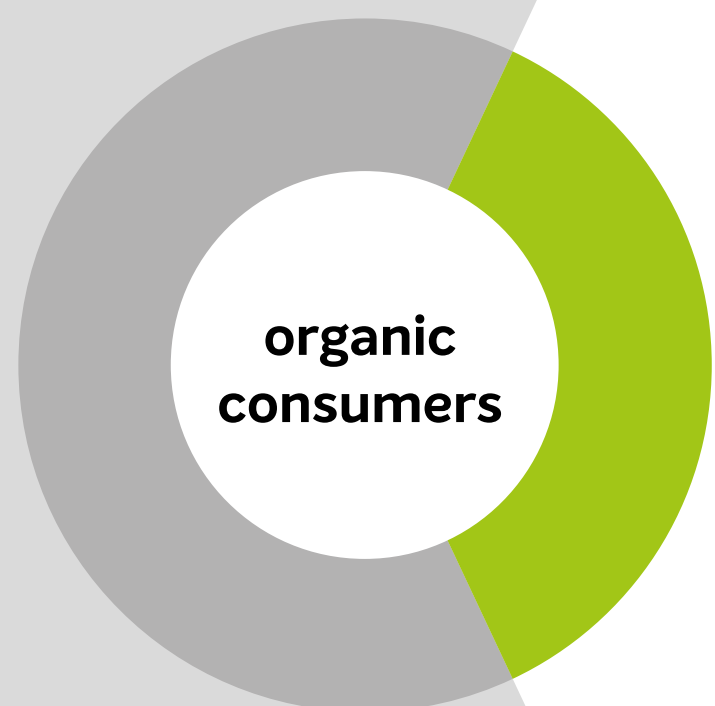
yes
37%

10%
sometimes
(or indifferent)

no
58%

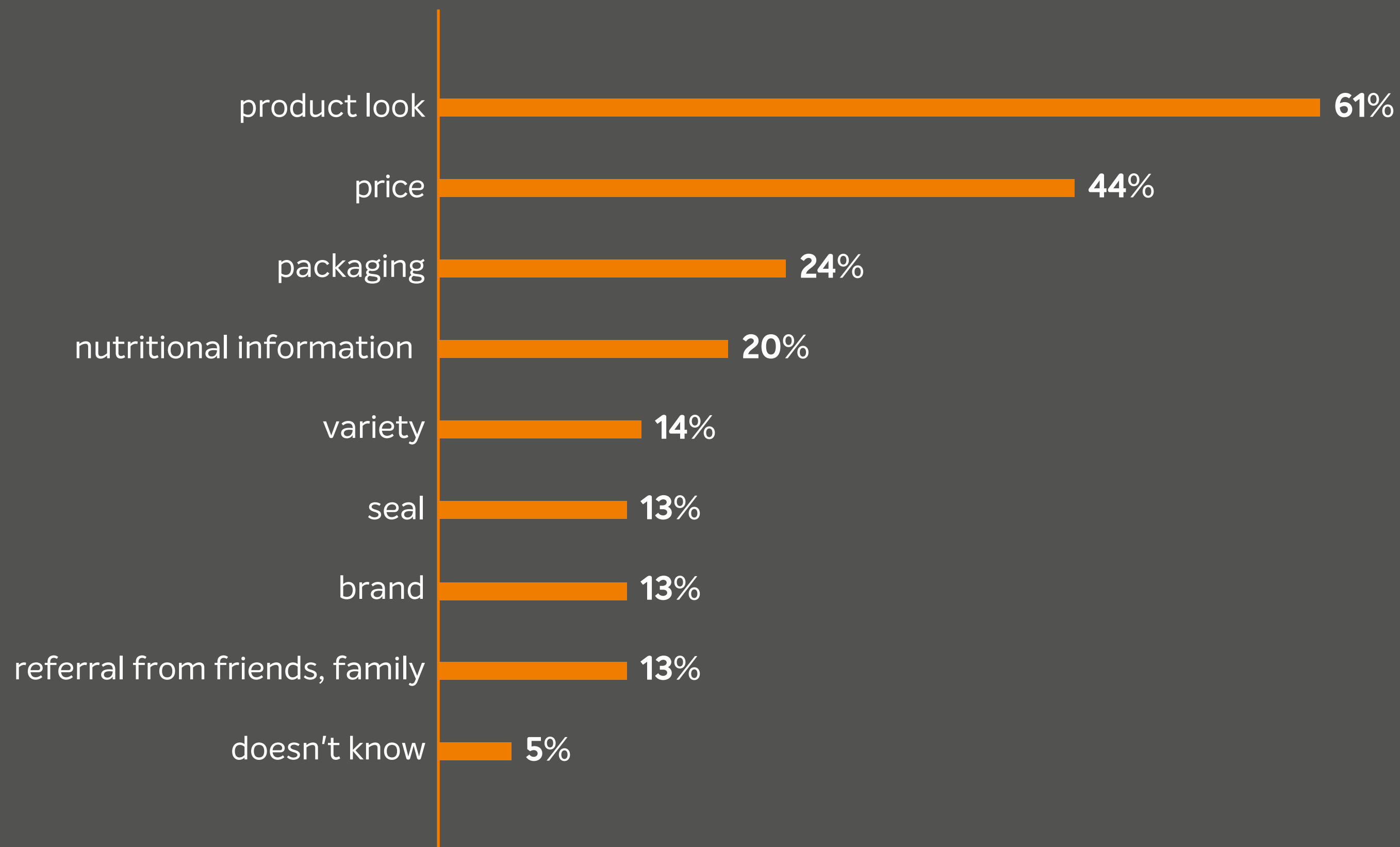
How do you identify organic products?

multiple answers



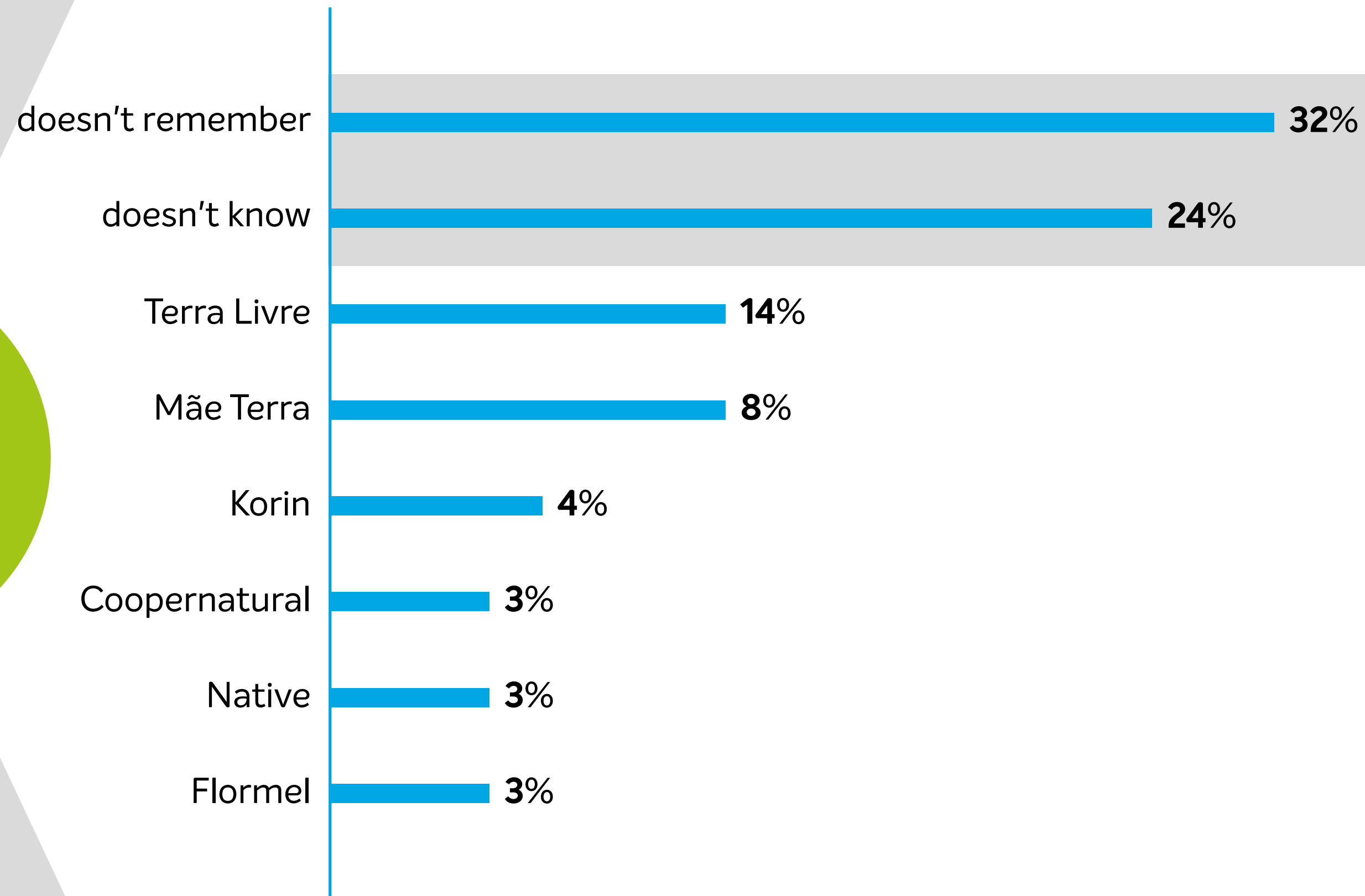
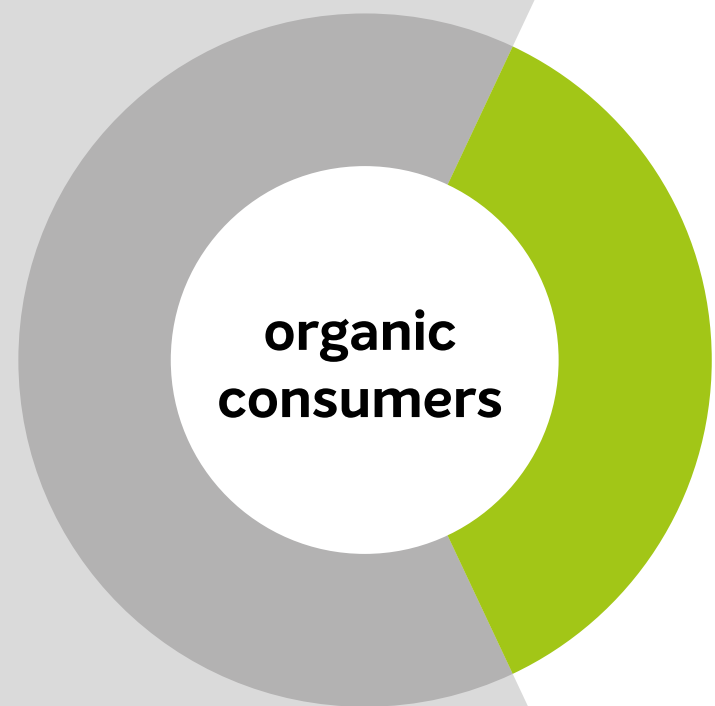
Criteria by which you choose organic products

multiple answers



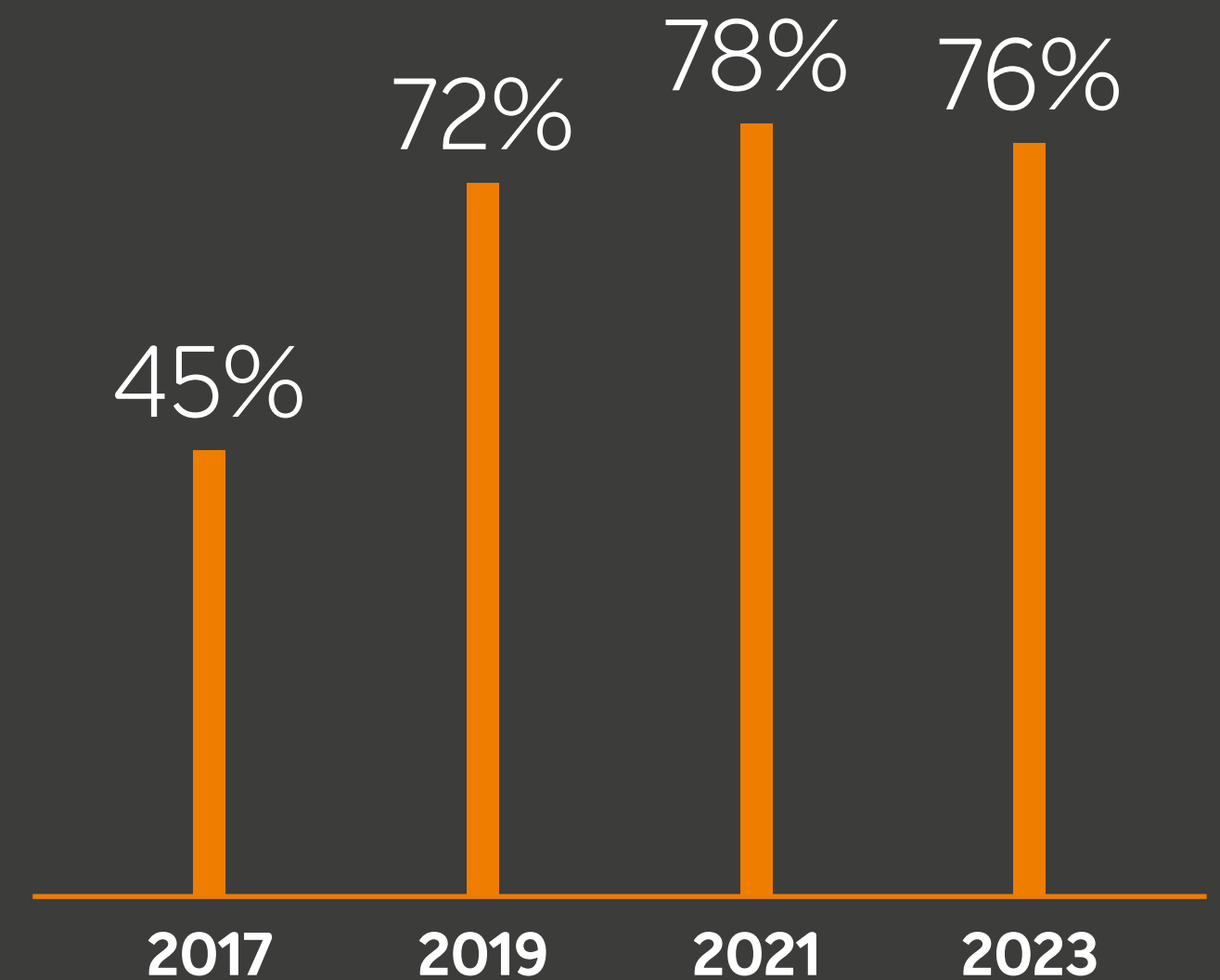
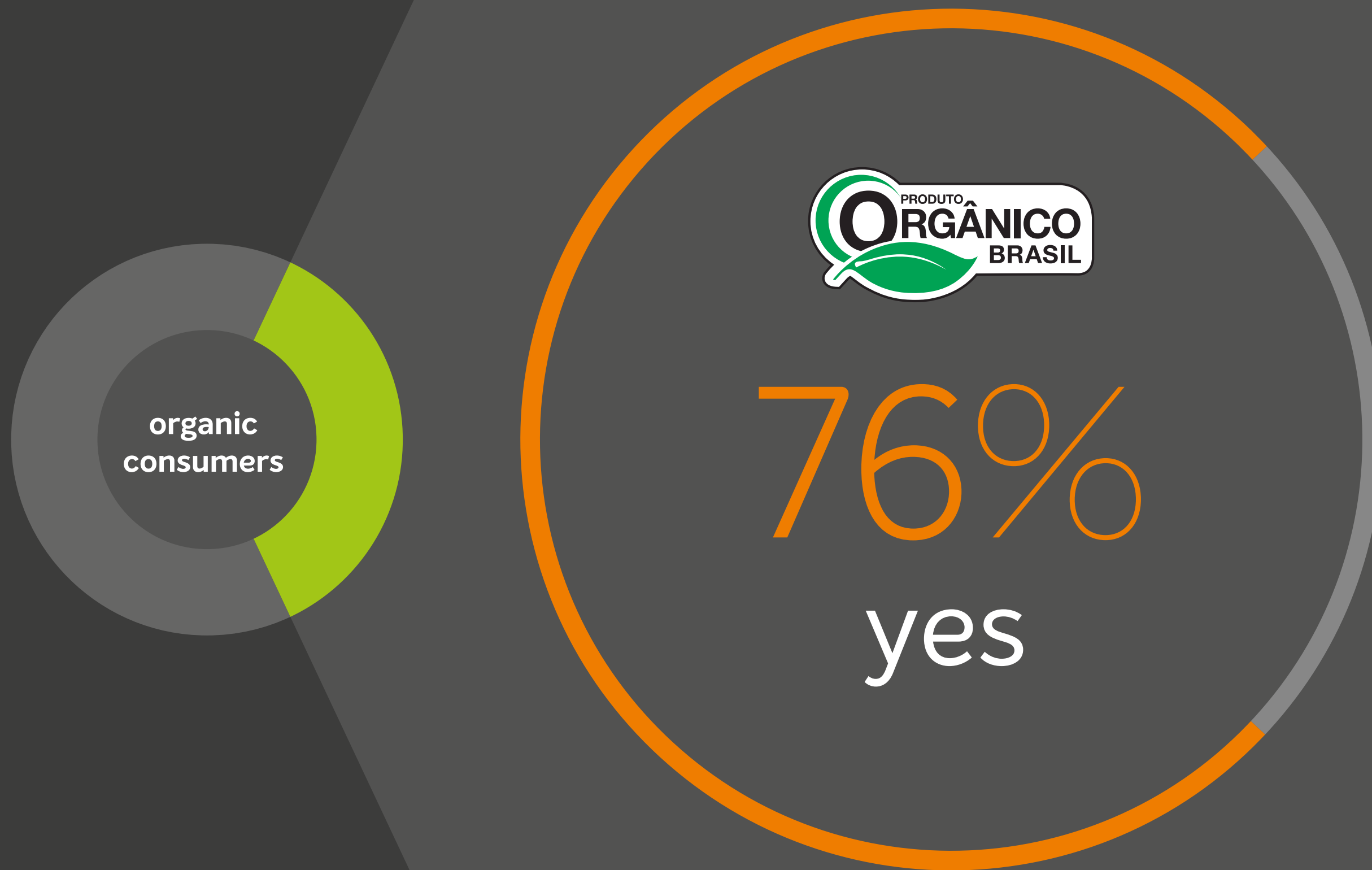
Brands most associated with organic products

multiple answers

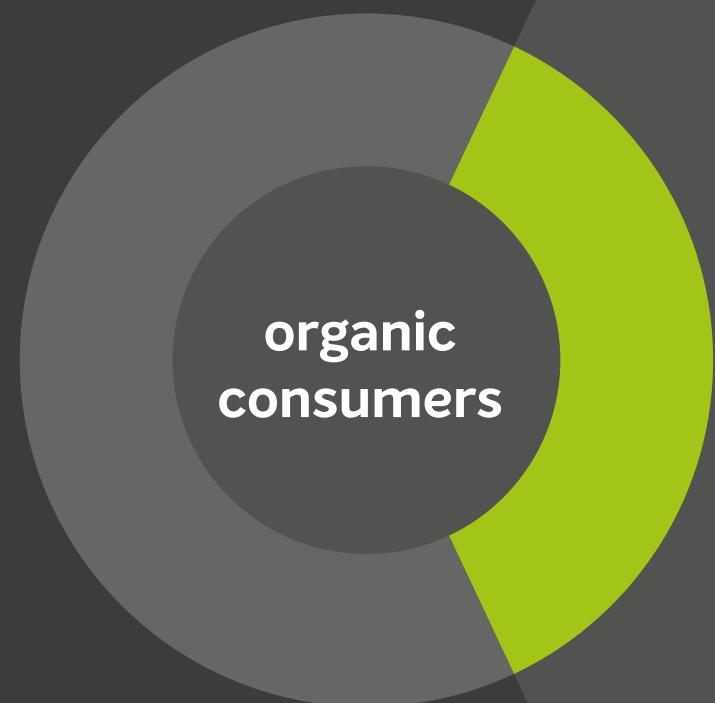


56%

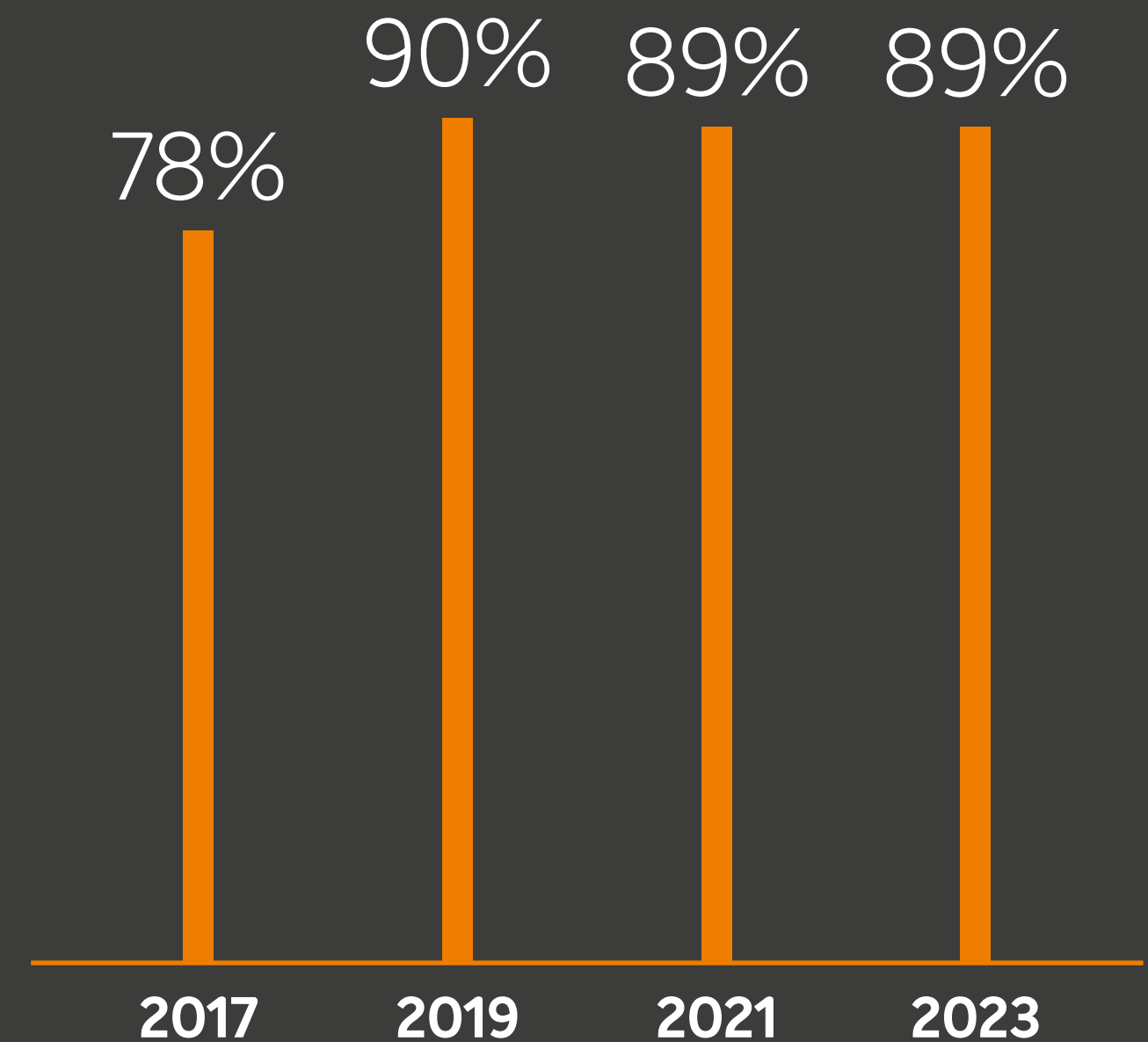
Do you know that there is a seal to certify that a product is really organic?



Do you agree that there should be a seal to certify organic products?



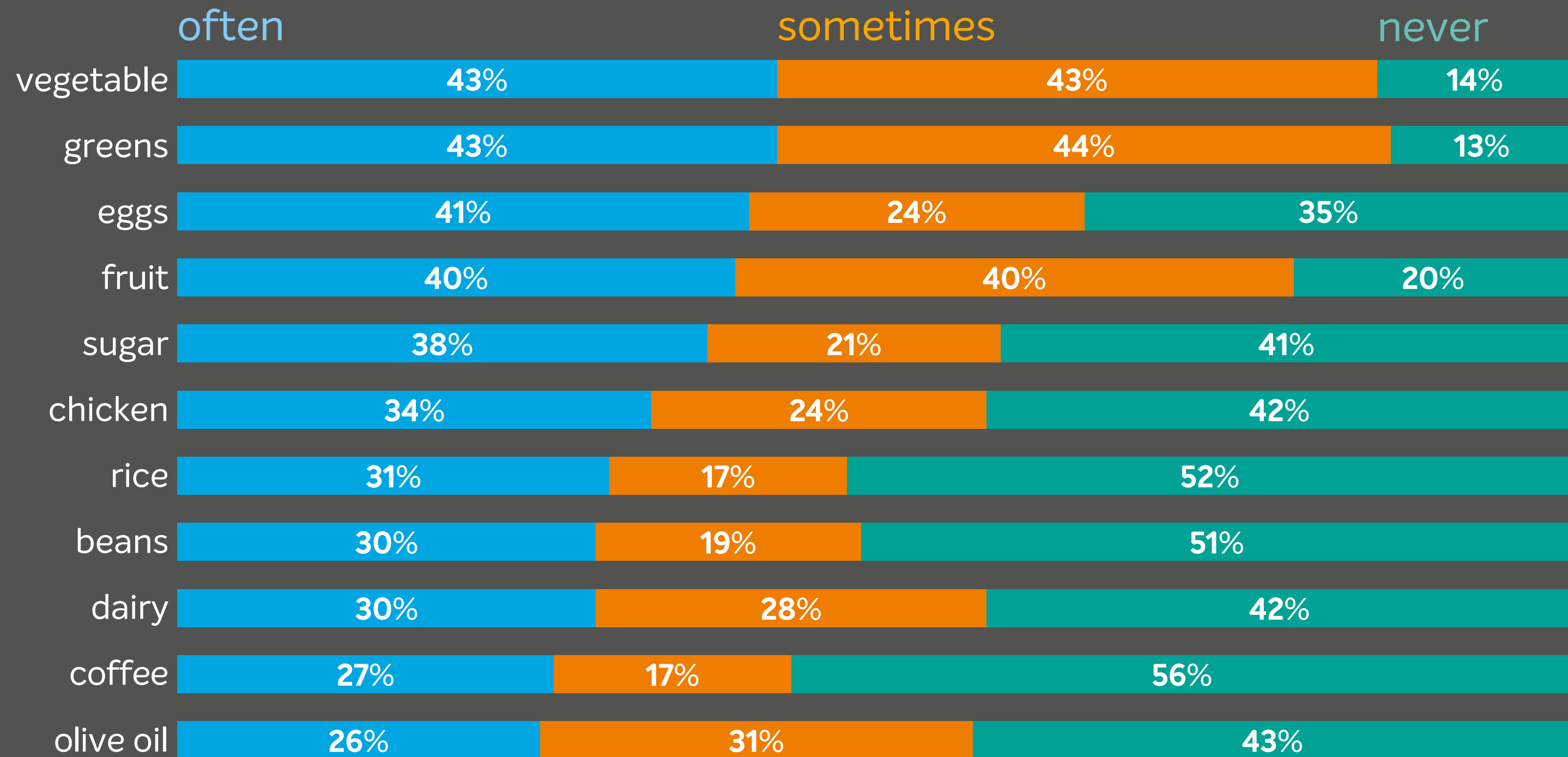
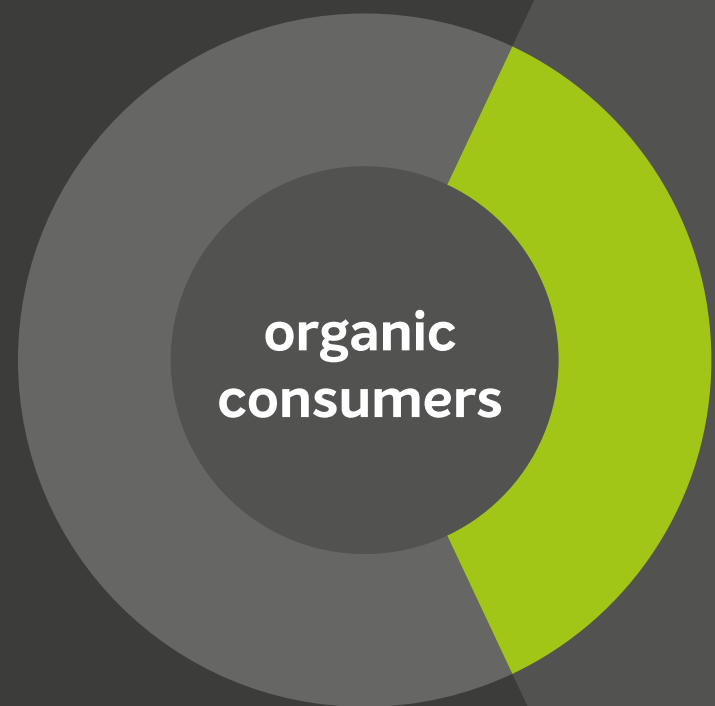
89%
yes



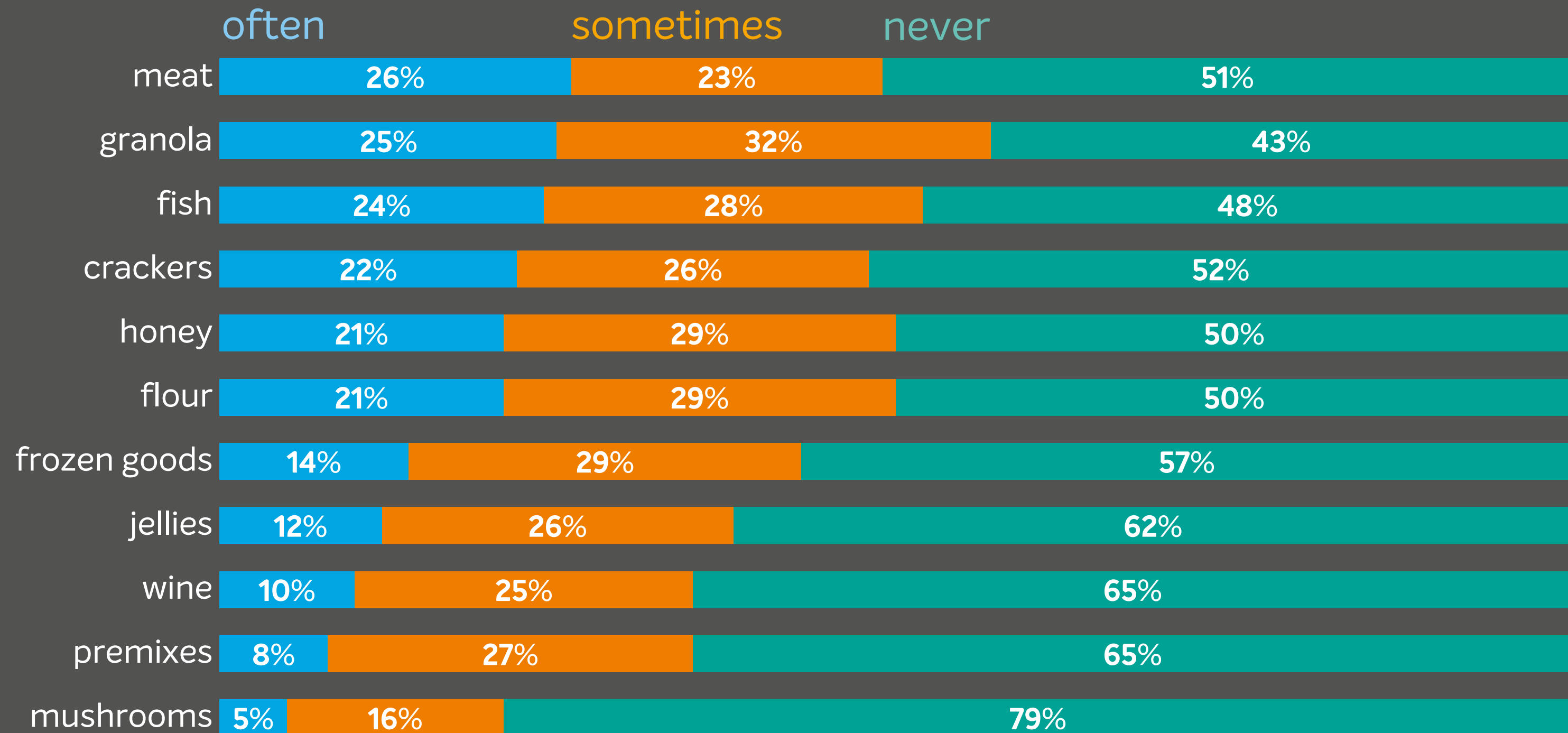
Do you think products with organic ingredients and organic products are the same thing?



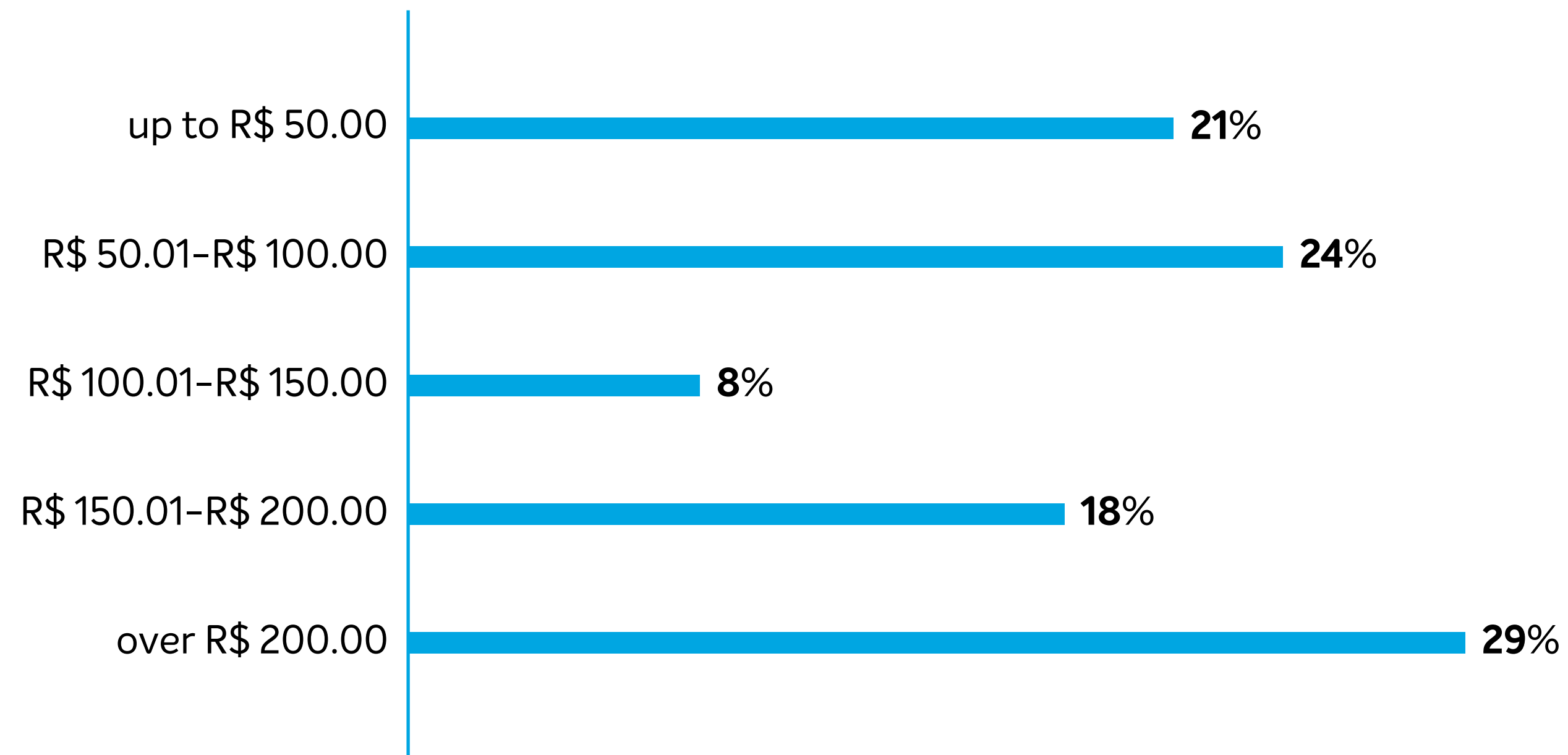
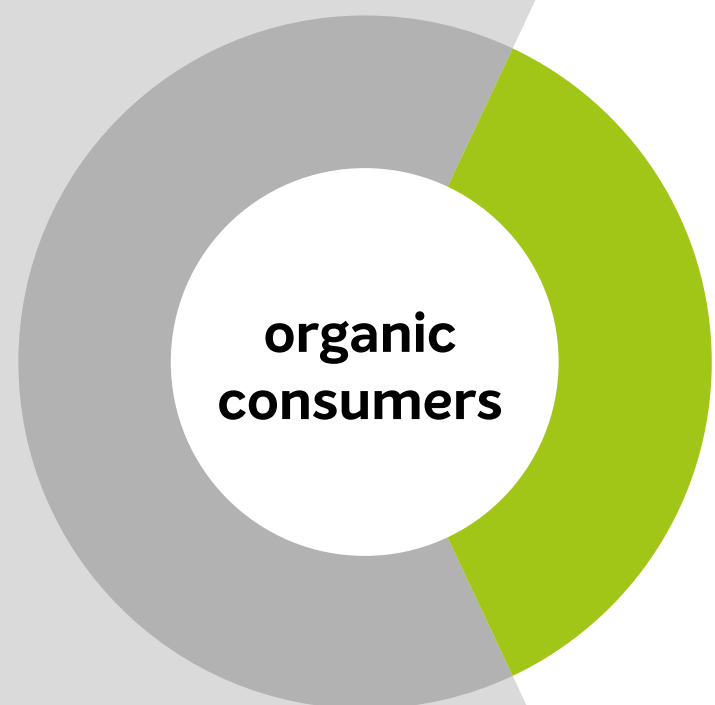
How often do you buy the following products?



How often do you buy the following products?

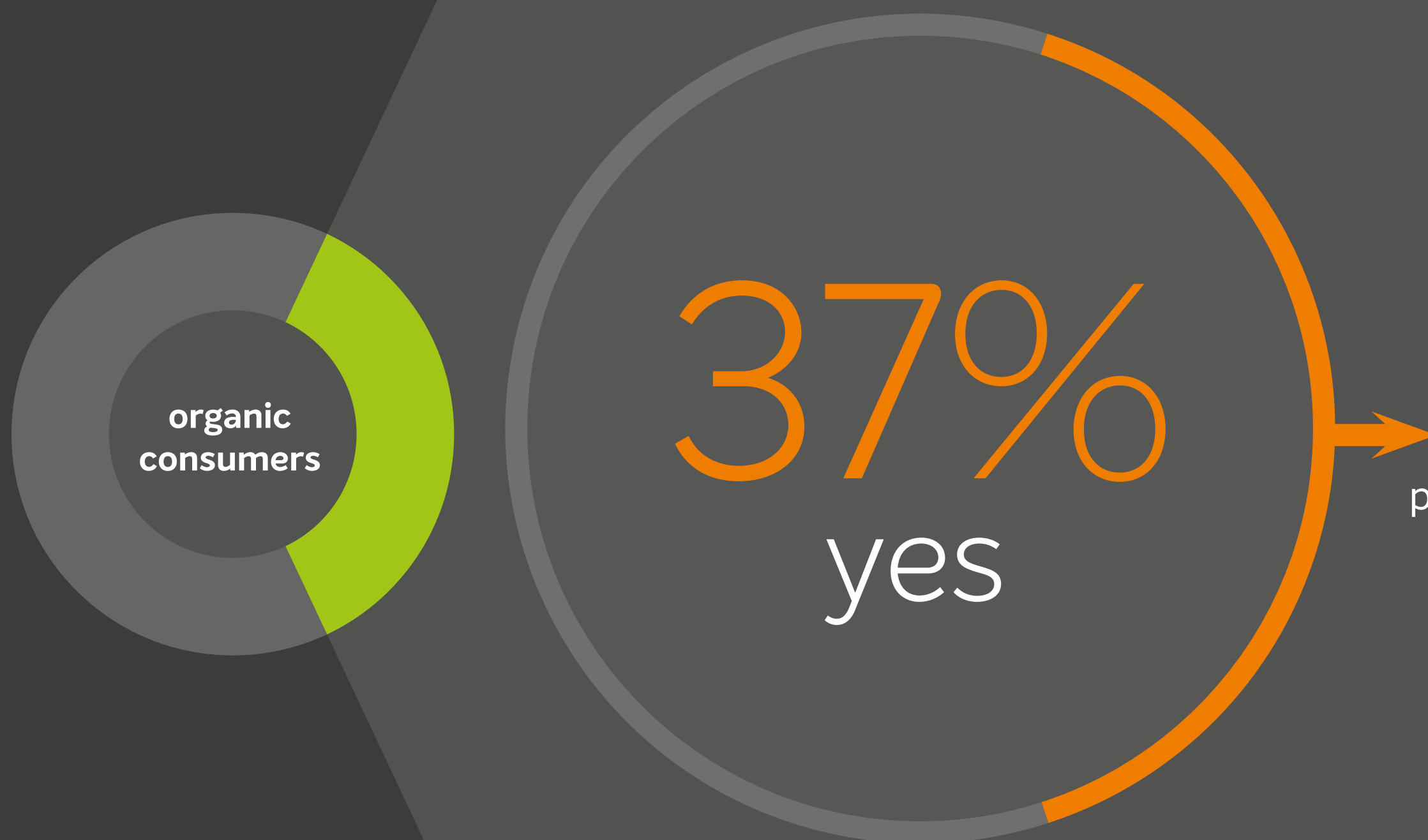


Average monthly amount spent on organic products

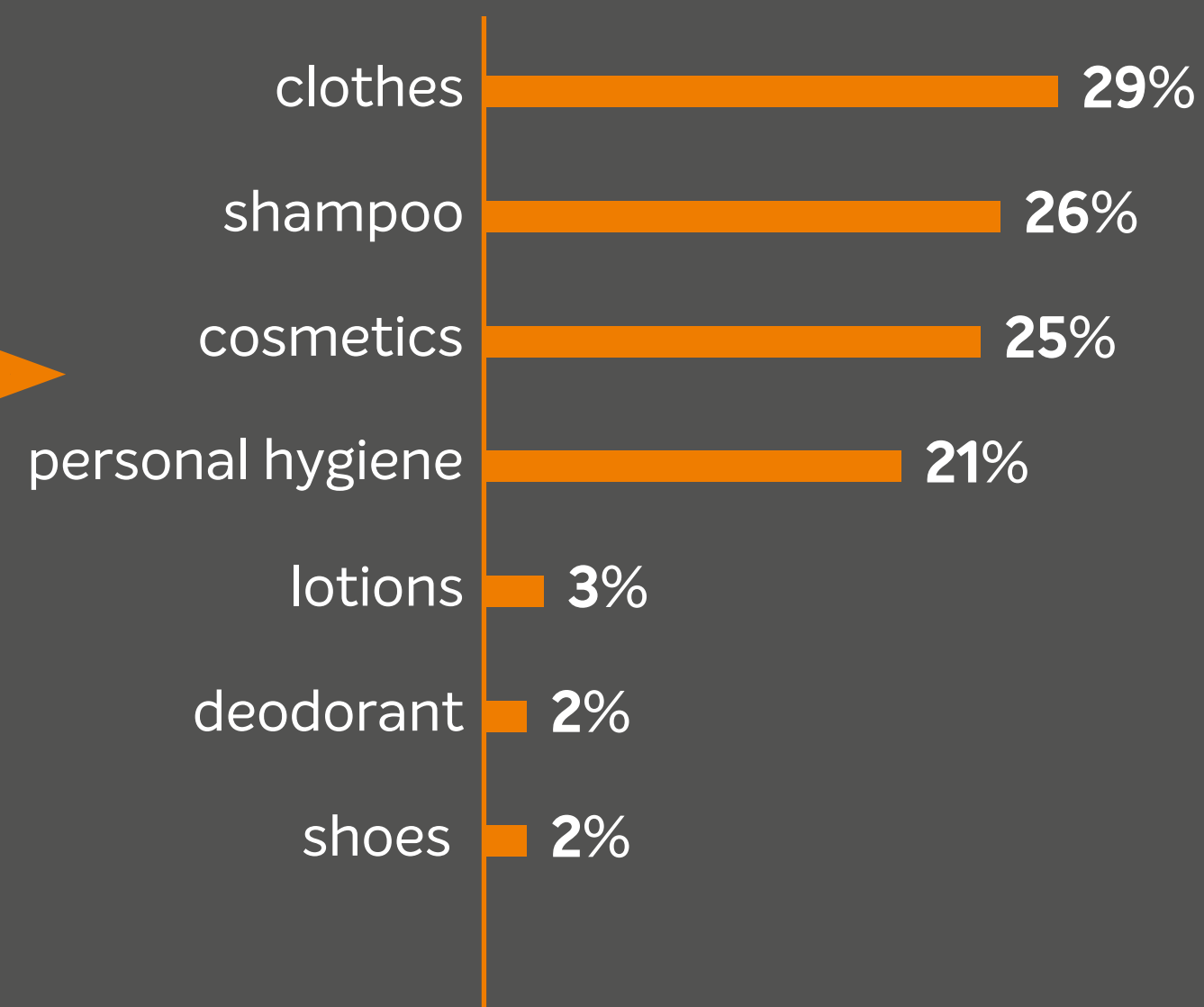


Do you know that in addition to food there are other organic products?

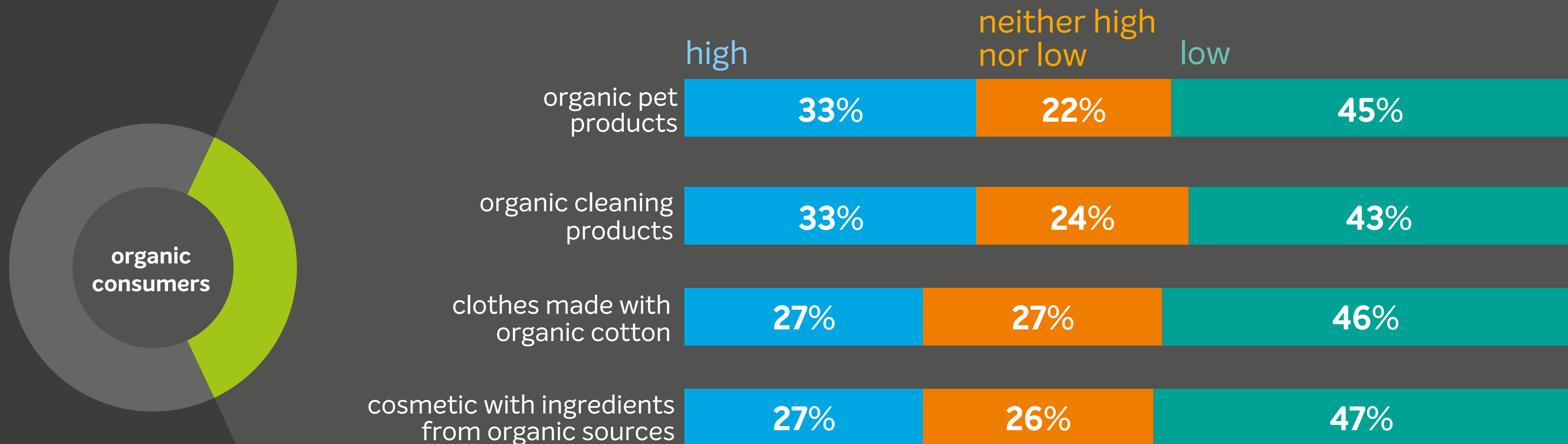
multiple answers



what organic products are you aware of?



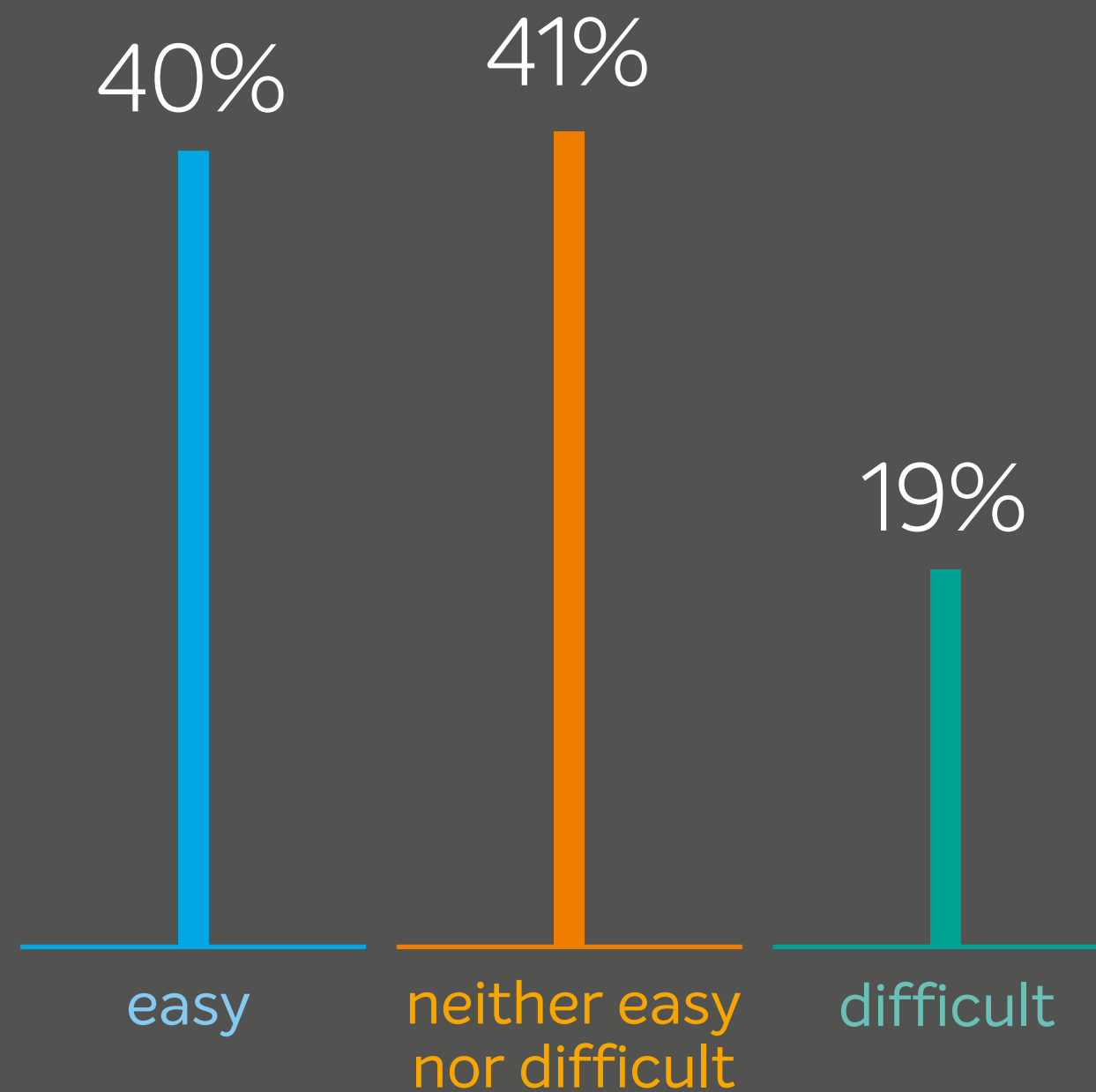
Willingness to purchase organic non-food products



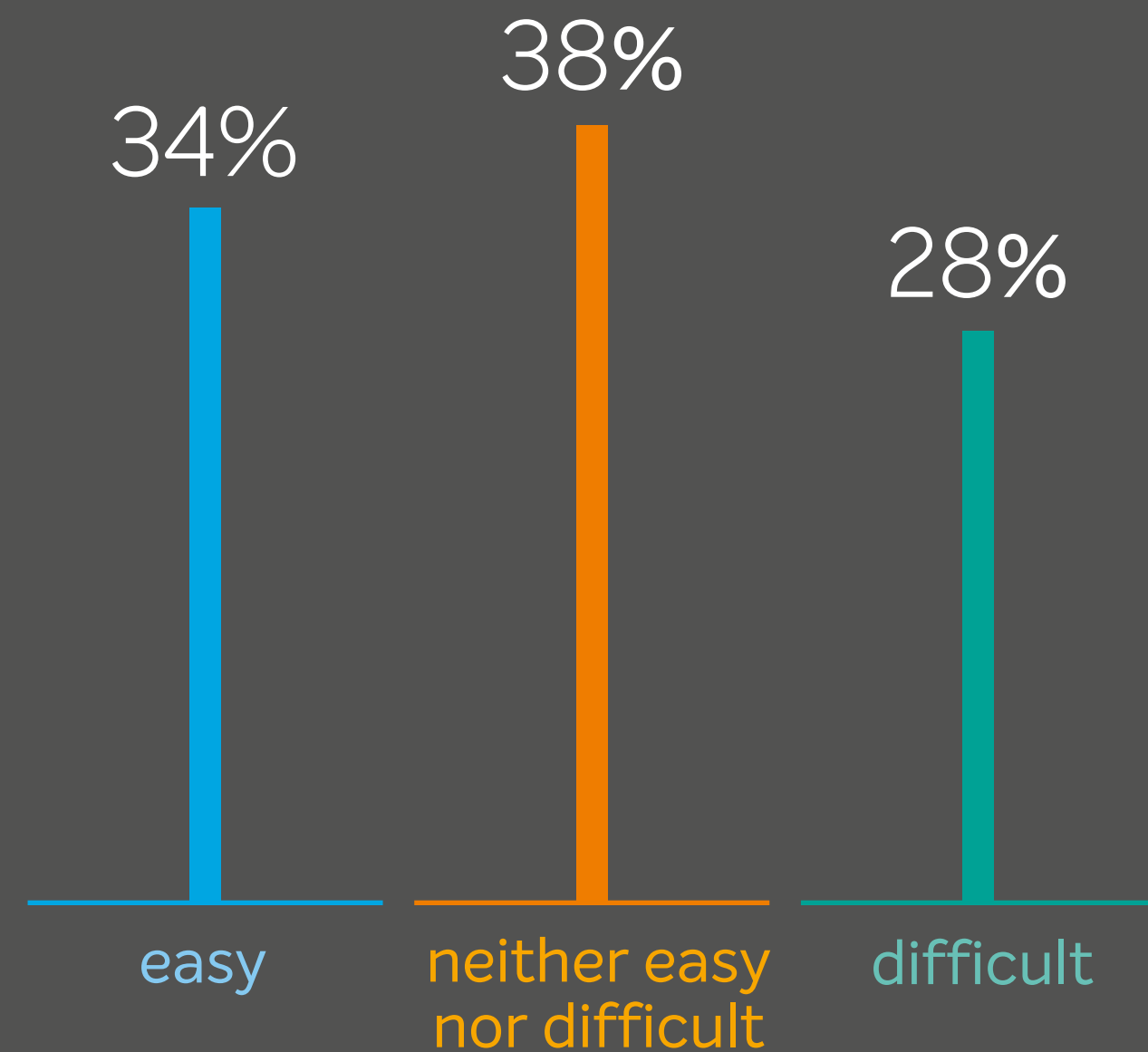
Distribution and diversity of organic products



access to organic products in local area

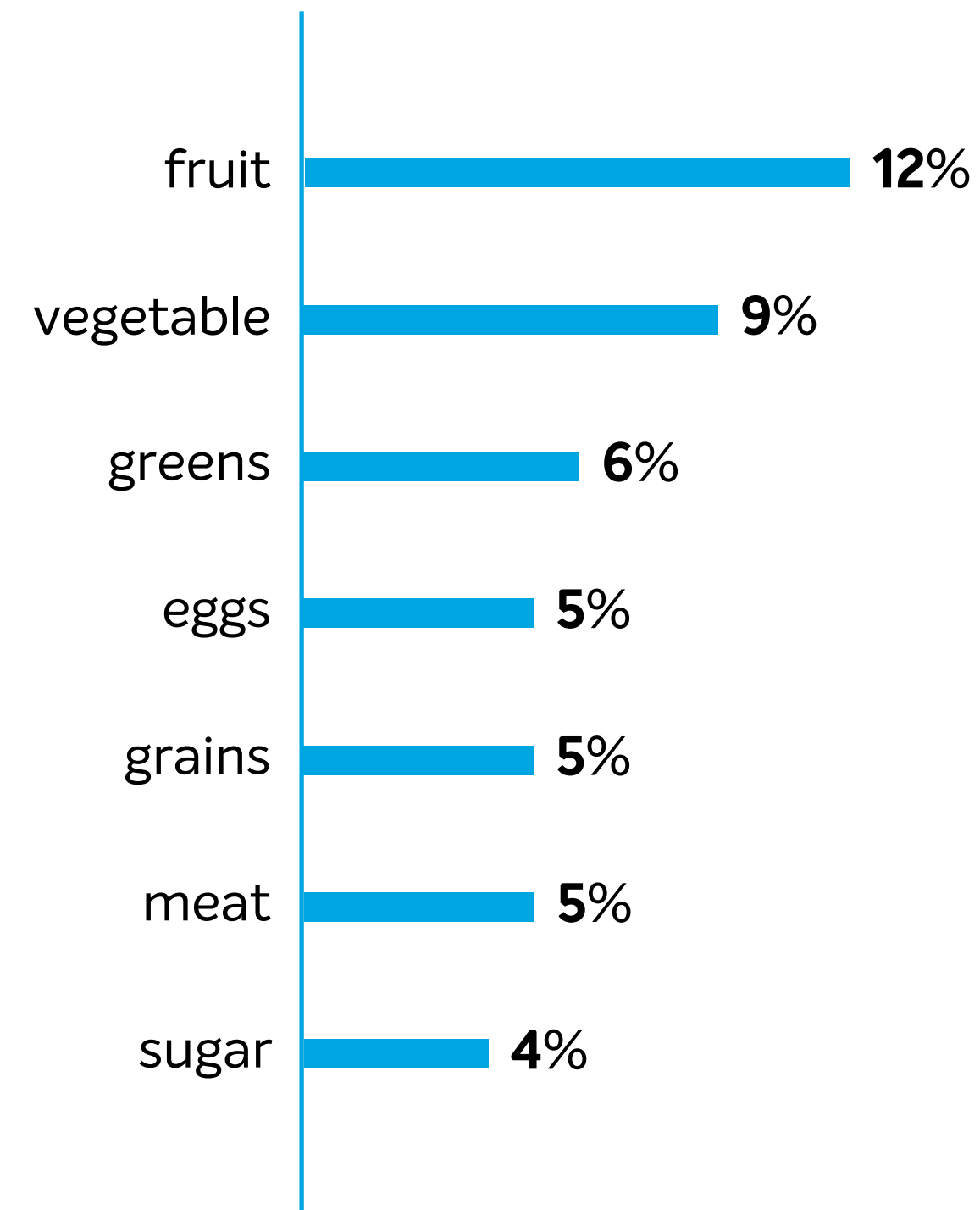
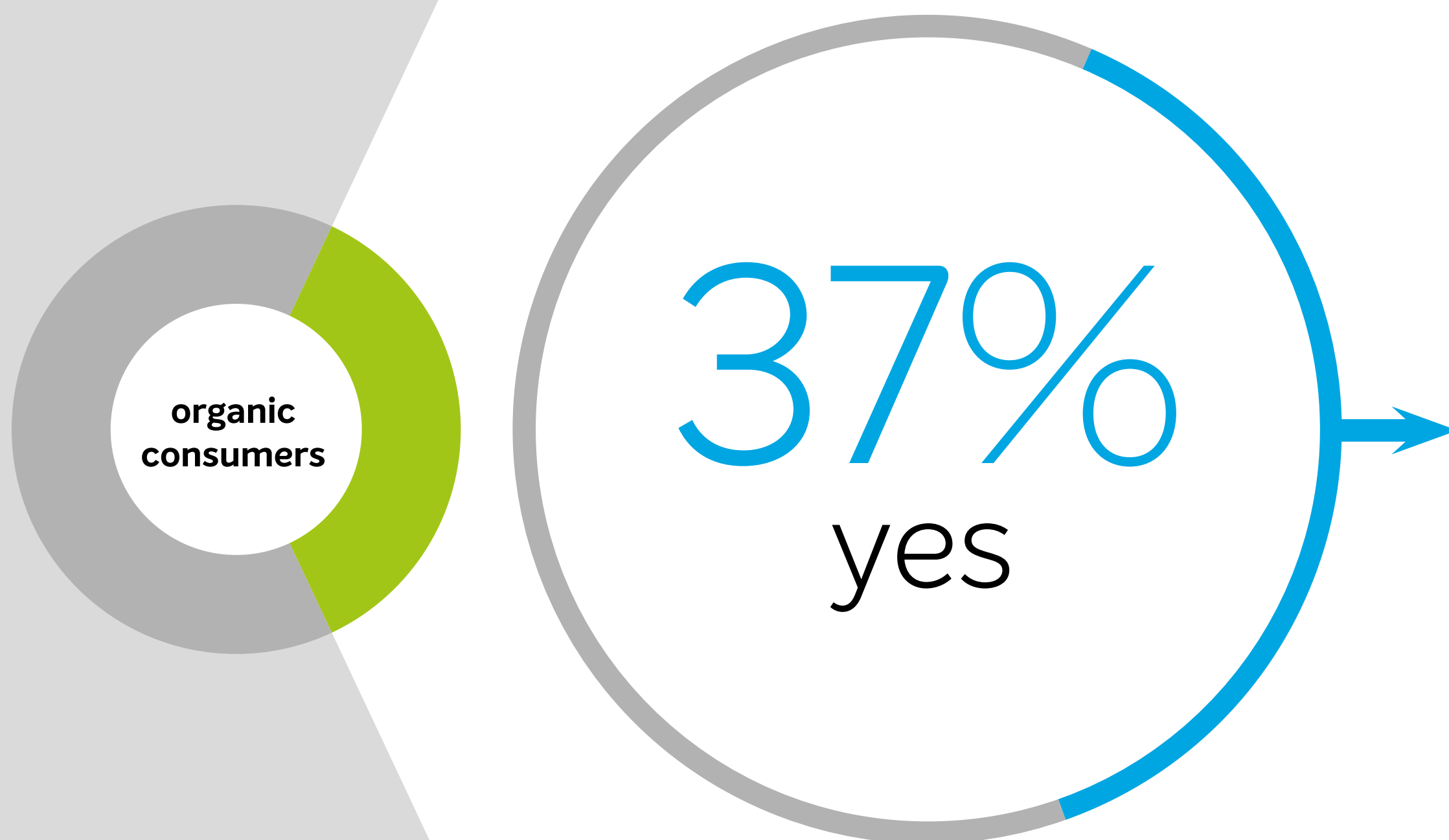


degree of difficulty in finding product **variety**



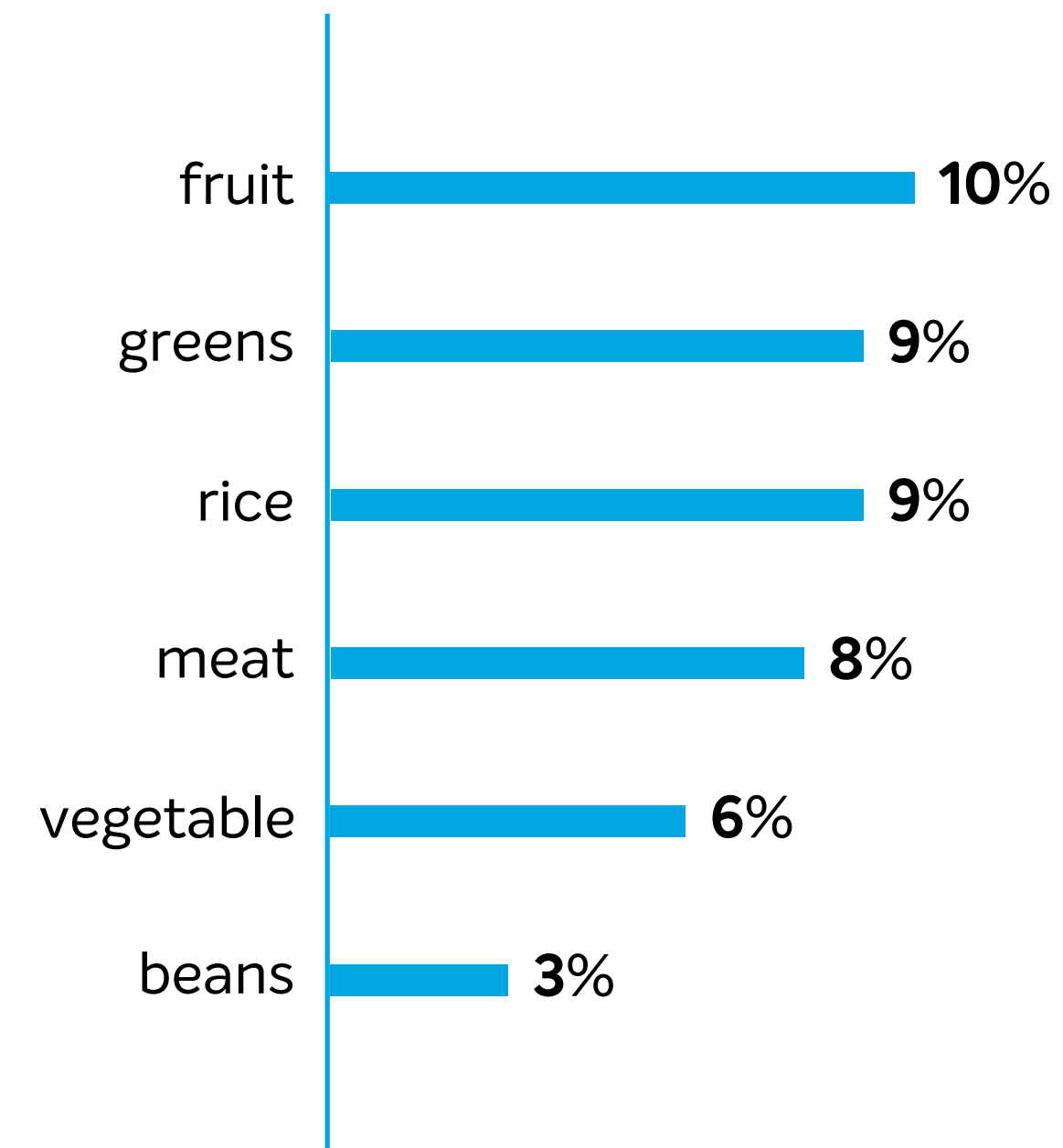
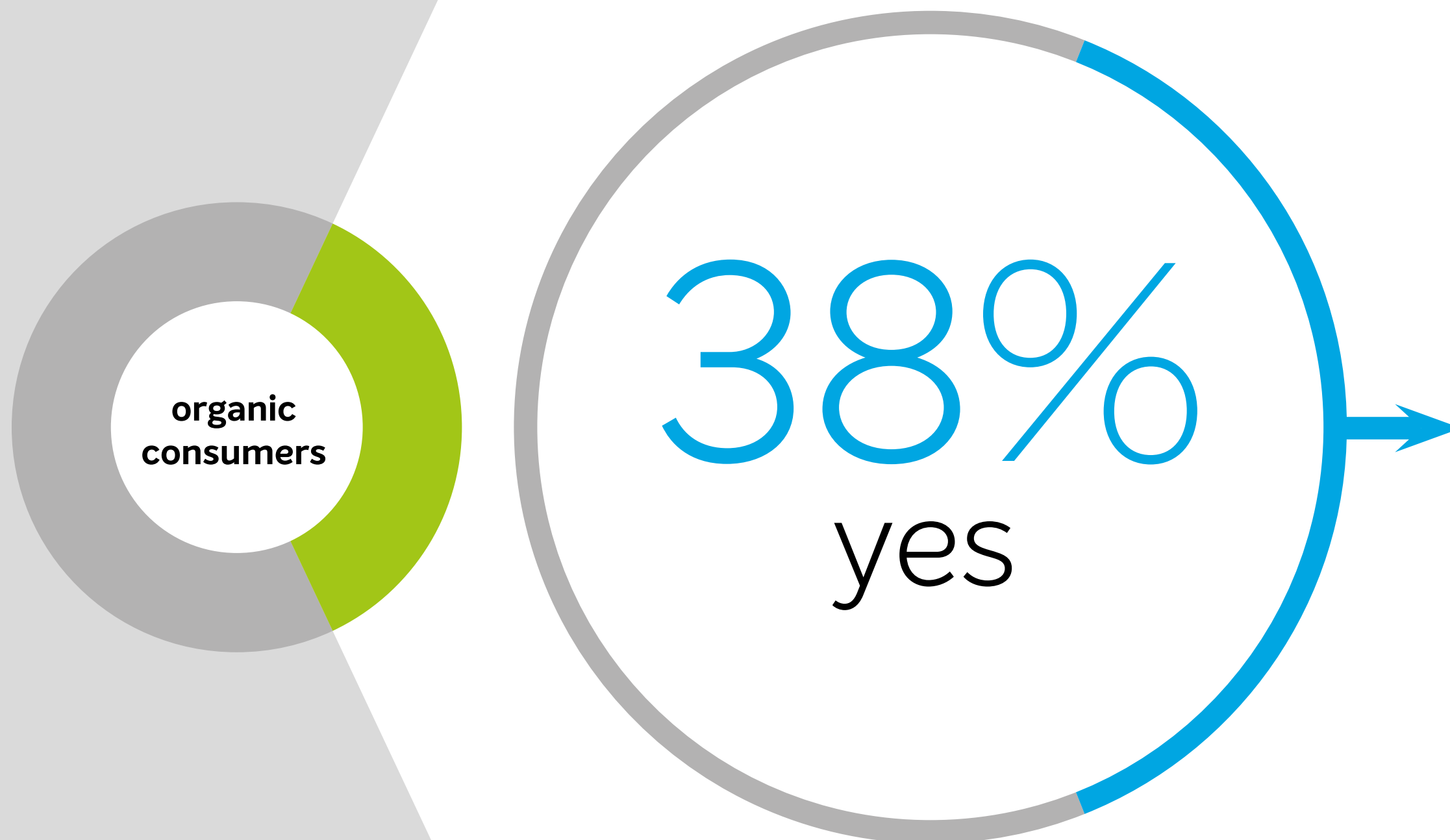
Is there a product that you consume or would consume only if it were organic?

multiple answers

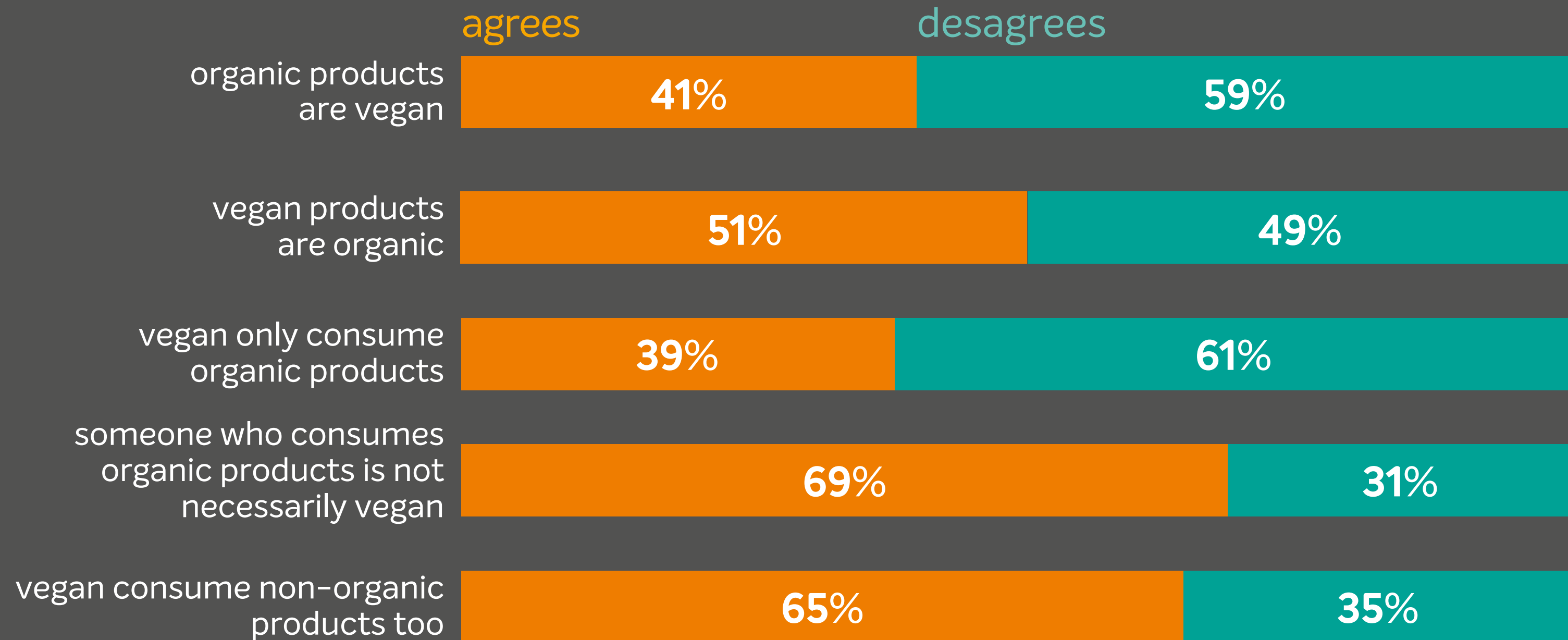


Is there a type of product that does not make a difference whether it is organic

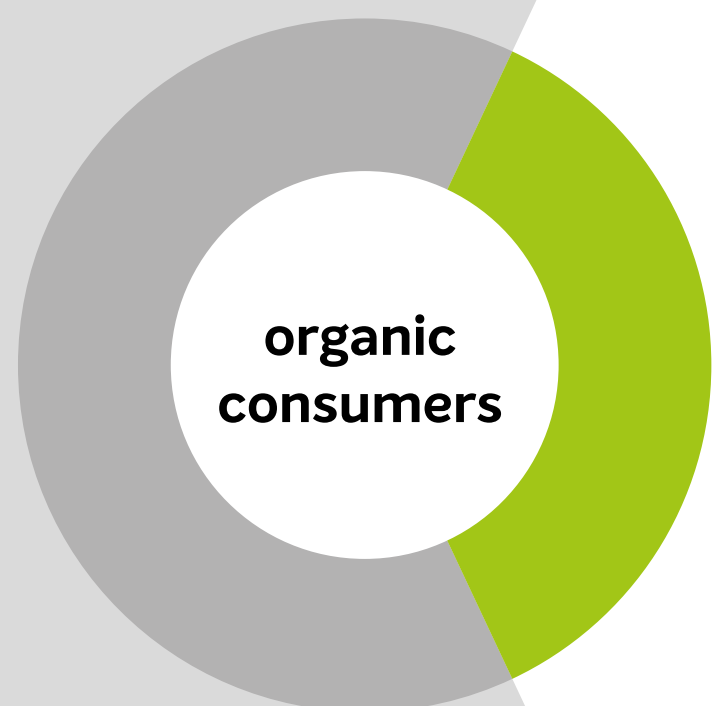
multiple answers



Relationship between veganism and organics consumption

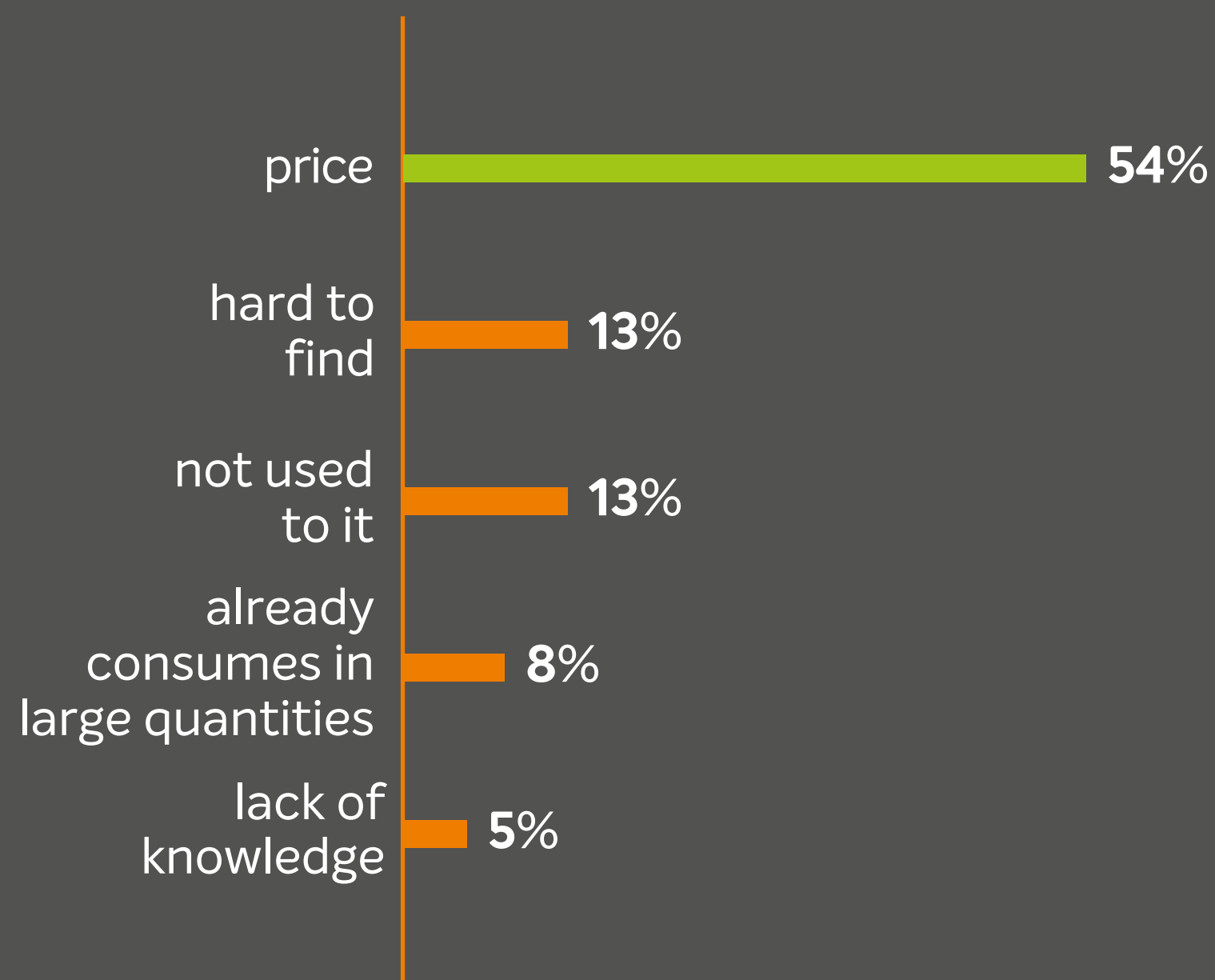


Perceptions about transgenic products

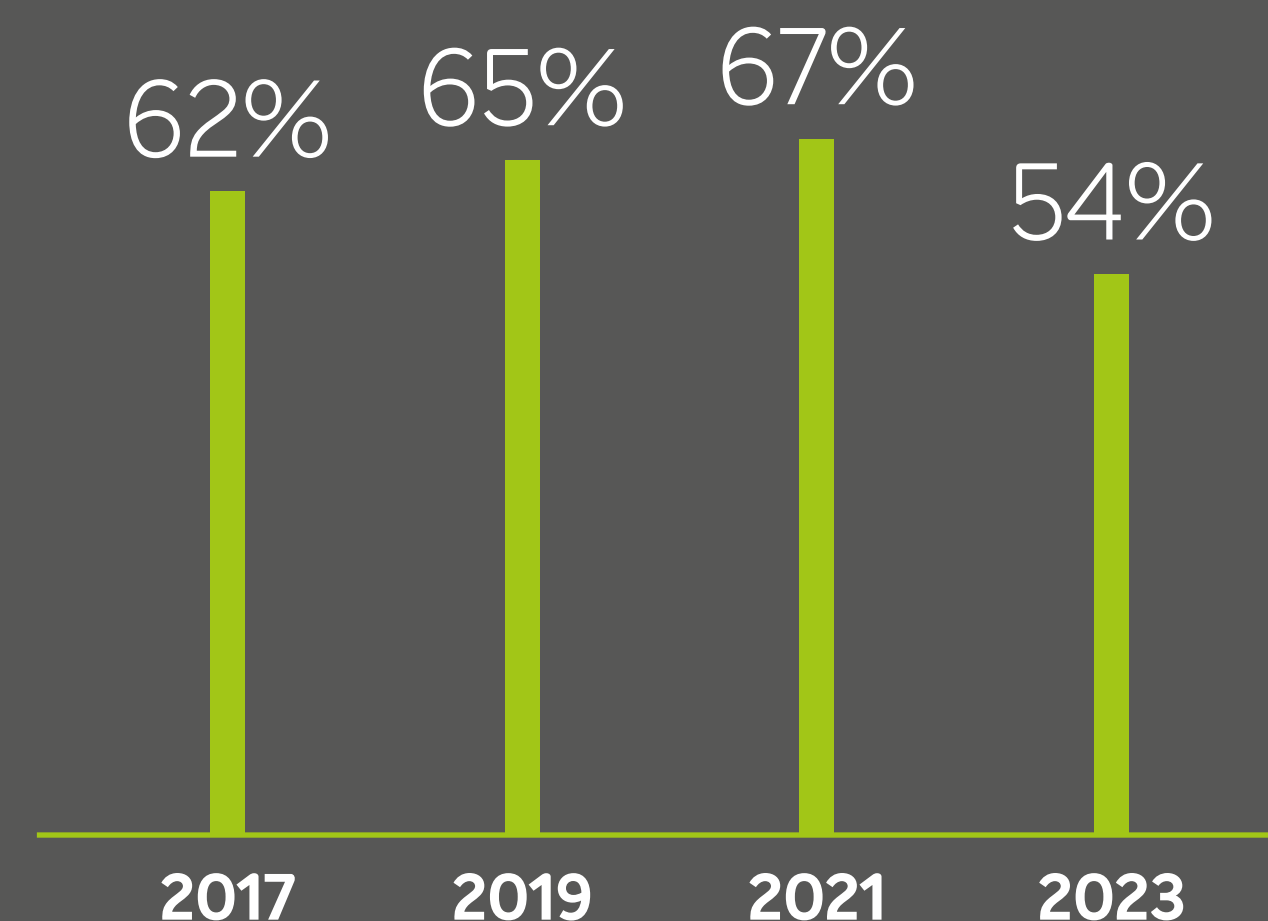


50%
would consume
a product that
is or contains
transgenic
ingredients

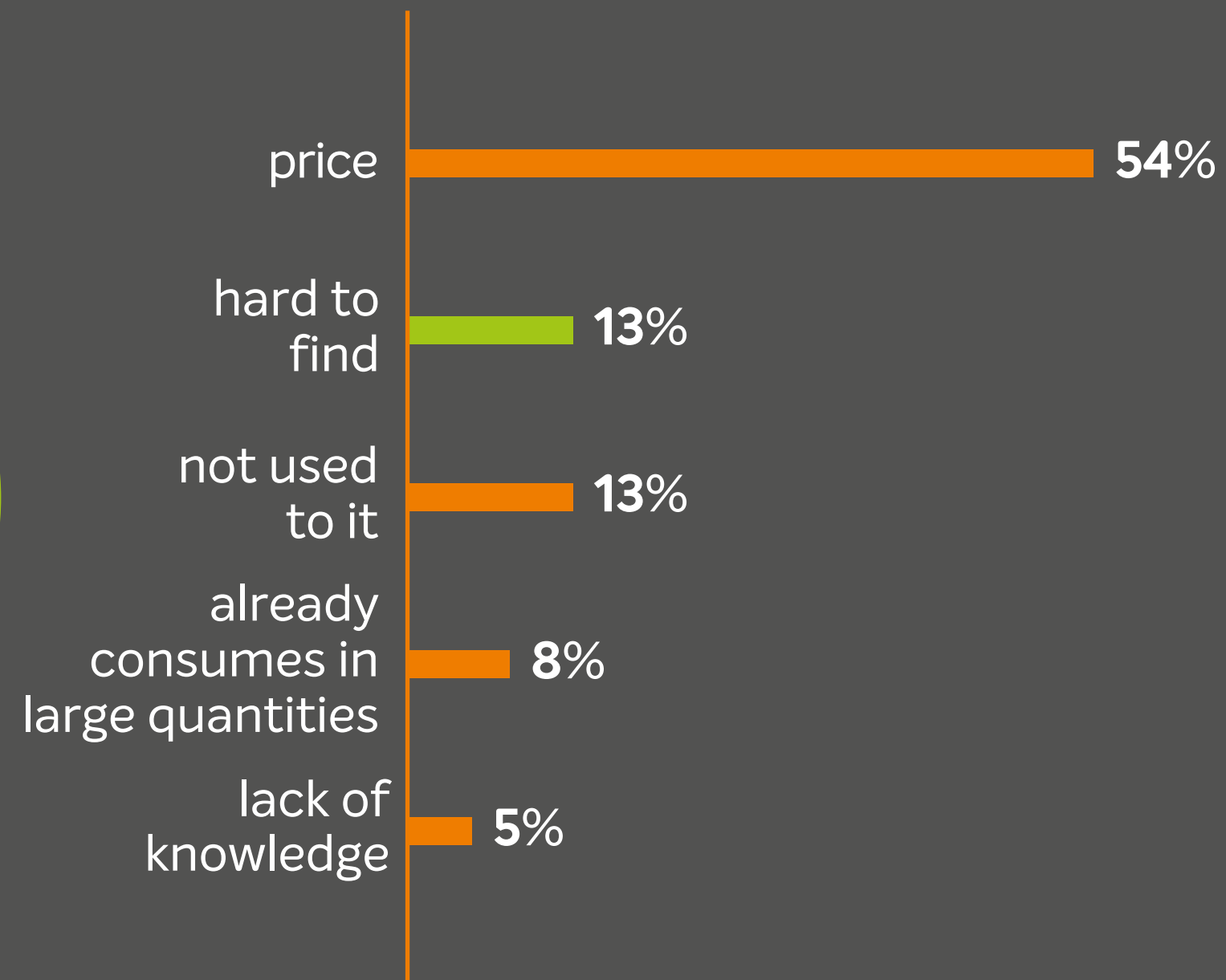
Reasons why you do not consume more organic products



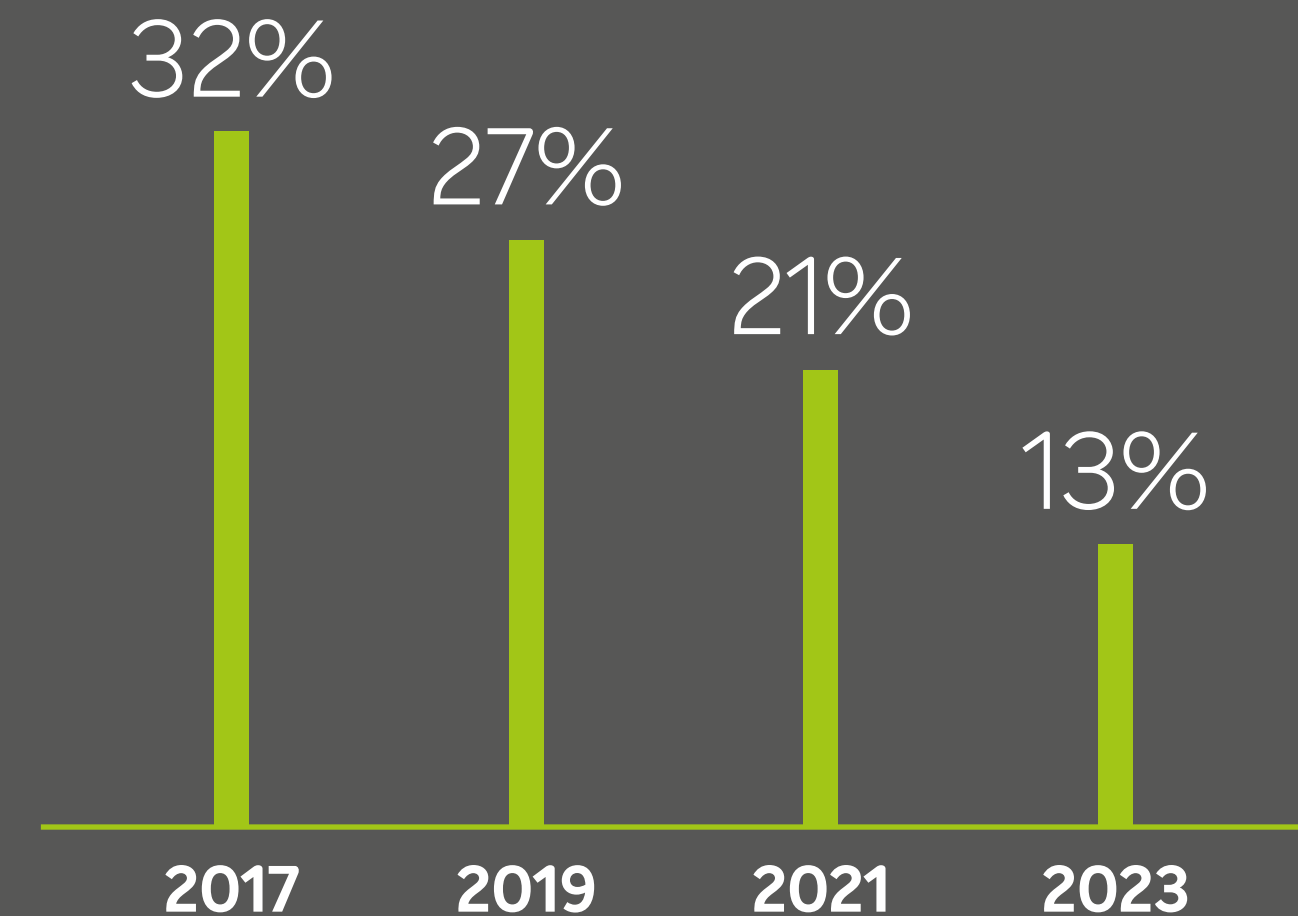
Comparison **price** as a barrier



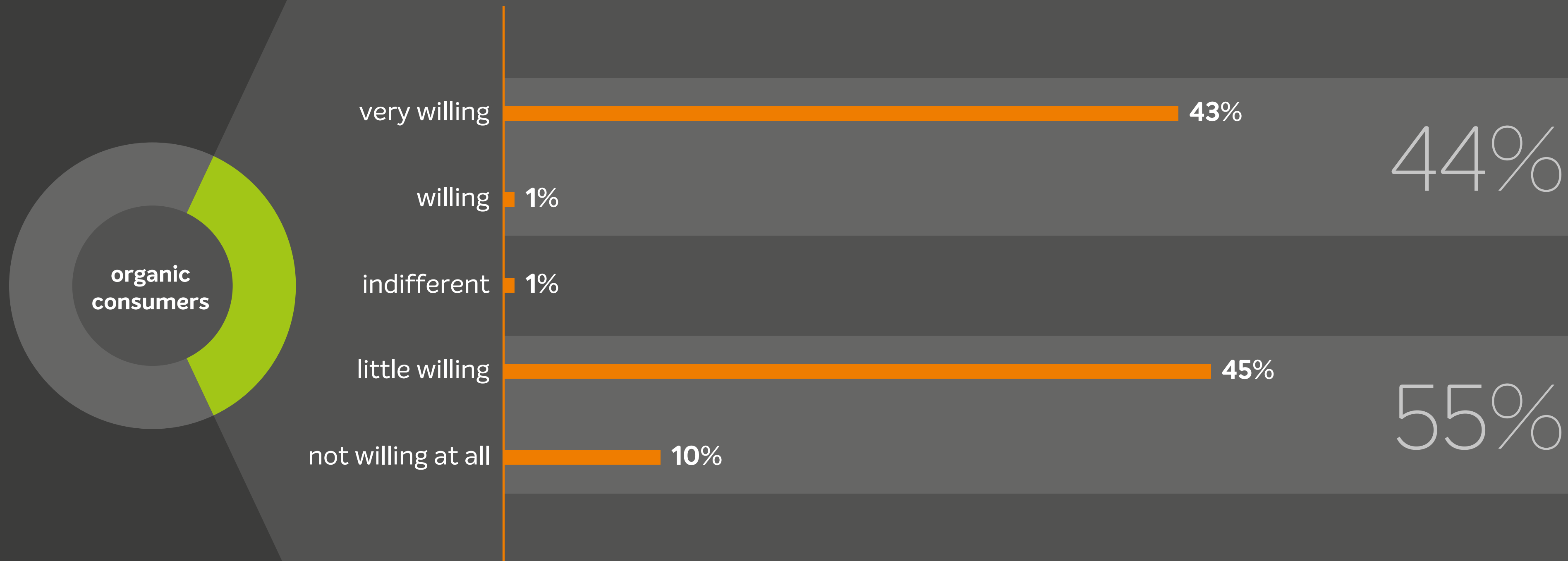
Reasons why you do not consume more organic products



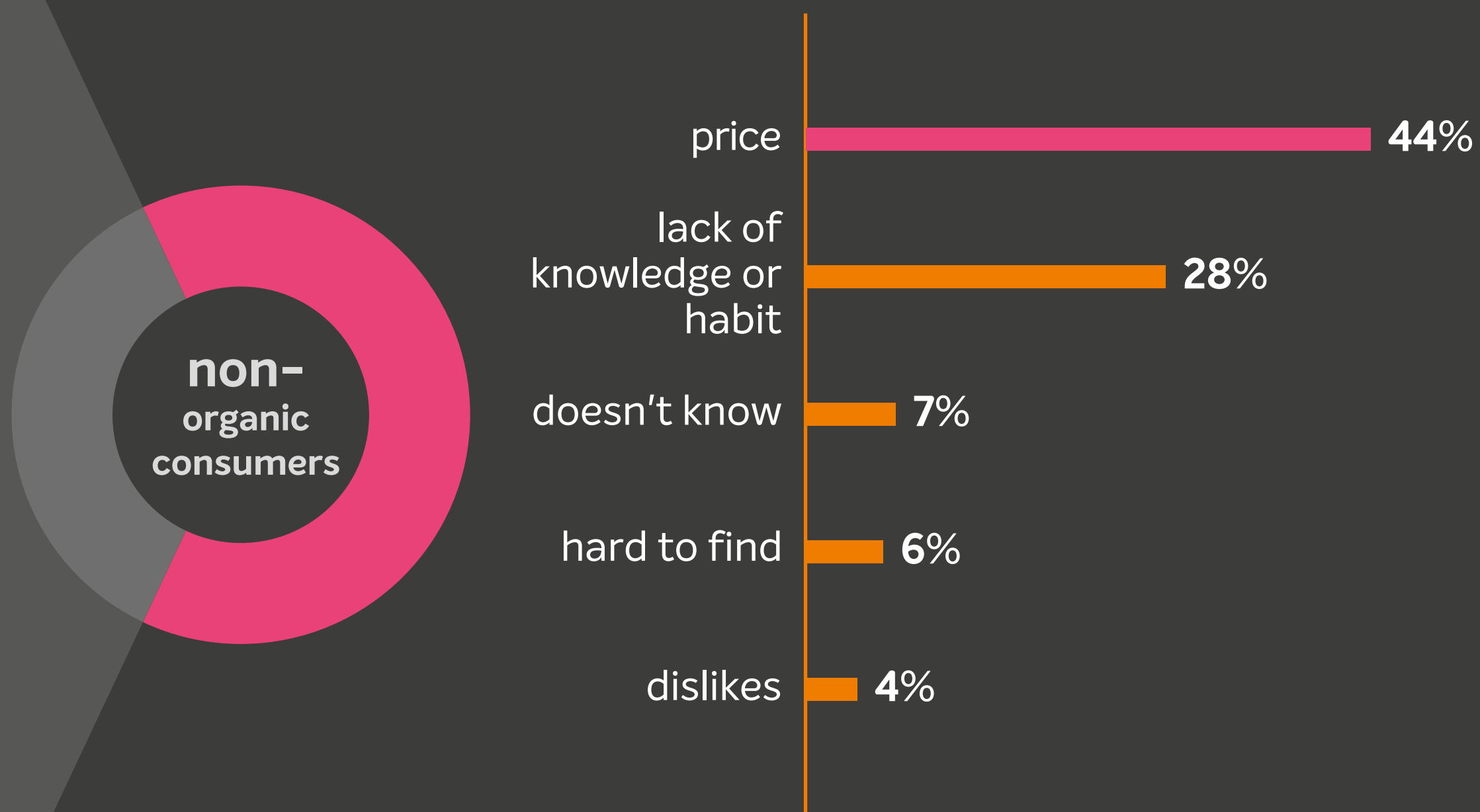
Comparison **distribution** as a barrier



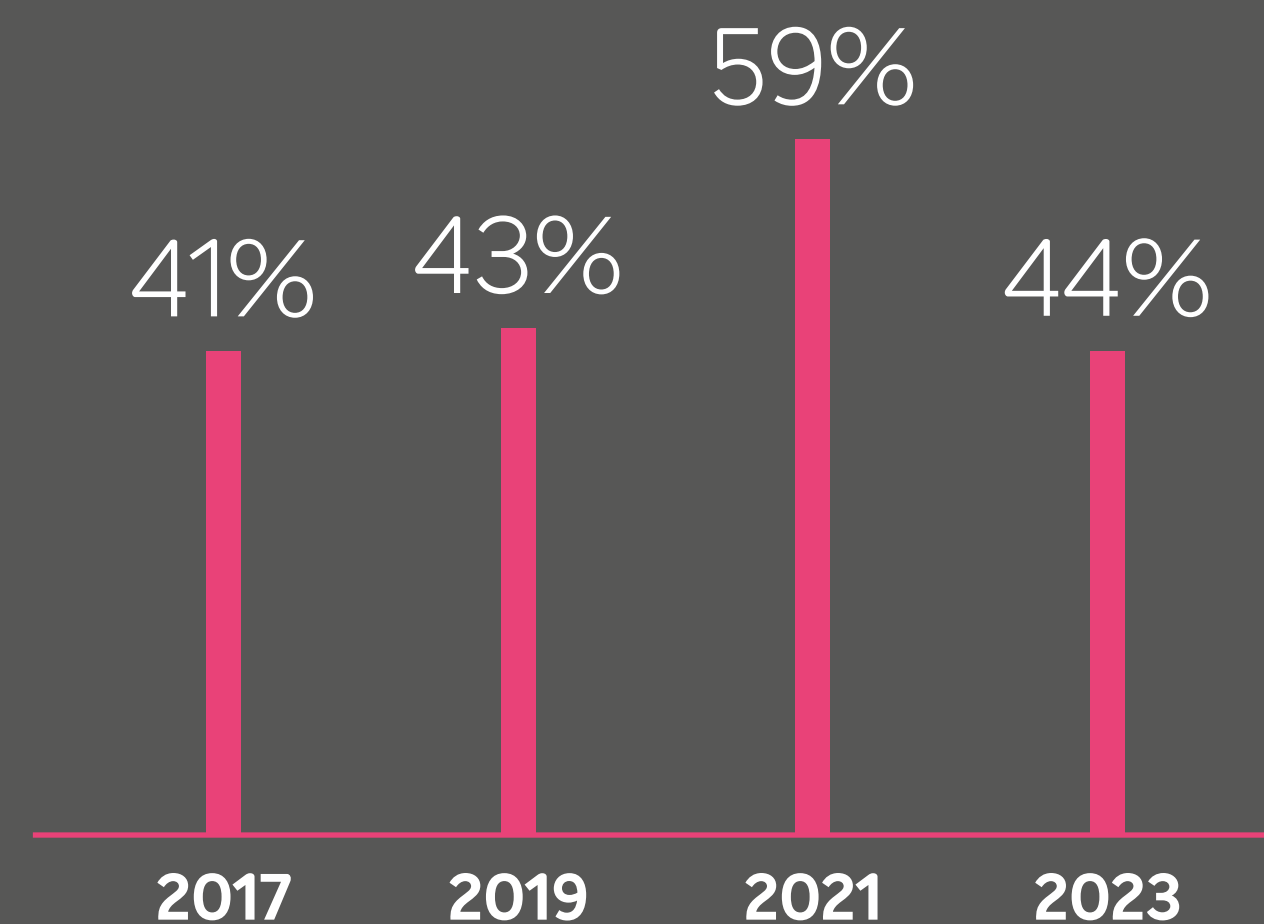
Willingness to consume more organic products



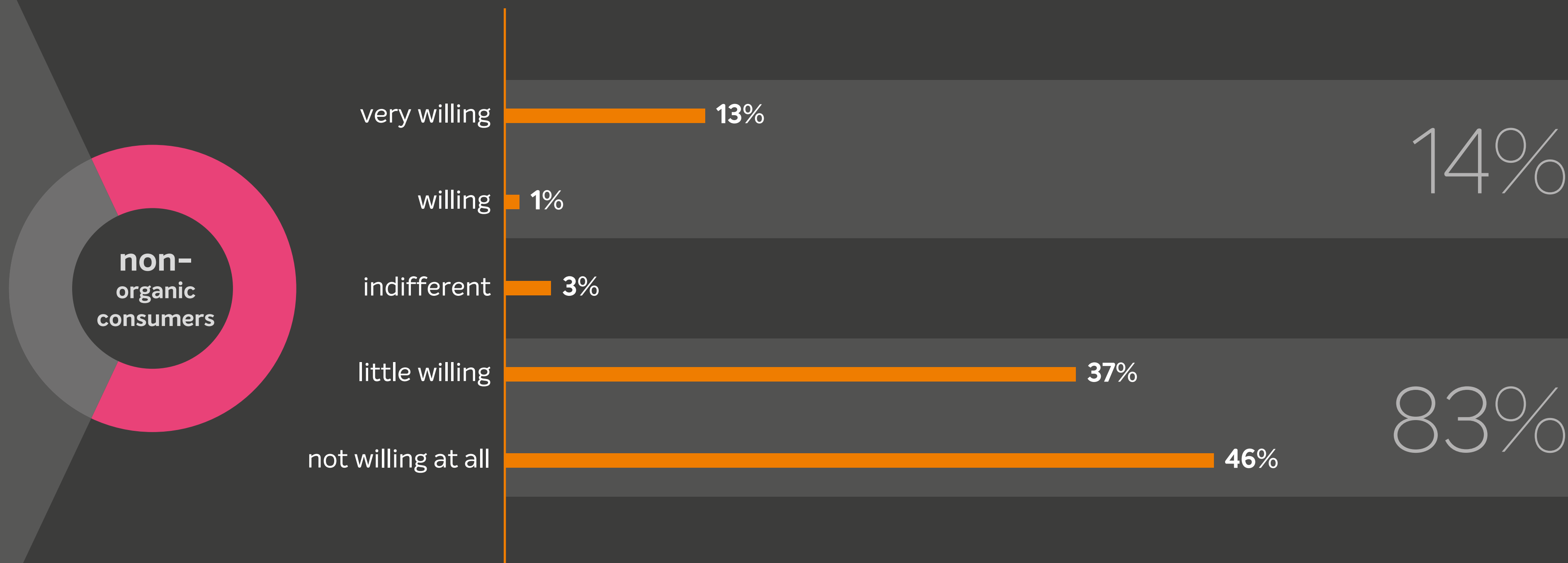
Reasons why you do not consume organic products



Comparison price as a barrier



Willingness to start consuming organic products



Buying habits

Continuous growth

Compared to the 2021 survey, the number of organic consumers advanced **16%**.

The association of organics with fresh vegetables persists

Already present in the other surveys, the strong association of organics with fruits, vegetables and greens was maintained, reiterating the need to disseminate other food products, such as meat, milk and derivatives, wines, oils, flours, breakfast cereals, grains and sugar, including in their industrialized versions.

Health concerns

The fact that it is a healthier option is the main driver for buying organic products for most consumers.



Buying habits

Visual stimulation

Most consumers say they recognize organic products by its packaging.

Recognition of the organic seal

The recognition of organic products by the certification seal remained at **39%** and is mentioned by **13%** of consumers as an important factor in the purchase decision. It is also observed that **89%** of them, same high level as 2021, agree that the certification seal must be present on the packaging.

Organic sections make it easy

The need to organize specific sections of organic products at points of sale is increasingly evident, as mentioned by **83%** of respondents.

Today, **24%** of consumers claim to identify organics at the point of sale thanks to it being in a separate section, up from **10%** in 2021.



Looks matter

From 2021 to 2023, the importance of product appearance as a buying factor grew significantly, as price and packaging continue to be the main factors.

Organic brands

Terra Livre, Mãe Terra and Korin continue to be the top of mind brands in the organic universe, all with an increased consumer recognition compared to 2021.

Availability

Nearest organics

Although they still claim that access to organics is difficult, consumers now are finding it easier to find the products in their routines.



Price

Price at times of crisis

The economic uncertainties faced by Brazil in 2021 and 2022 have increased the perception that organic products are more expensive.

Fair price

Most organic consumers consider that there are good reasons for higher product prices.

The break-even point

The numbers show that the vast majority of consumers consider it reasonable to pay around **20%** more for organic products, compared to conventional ones.



Open space for increased consumption

54% of those who declared themselves regular consumers pointed to the price factor as the main reason for not consuming more organic products. Of these, a significant percentage, **43%** of respondents, declare that they are very willing to consume more.

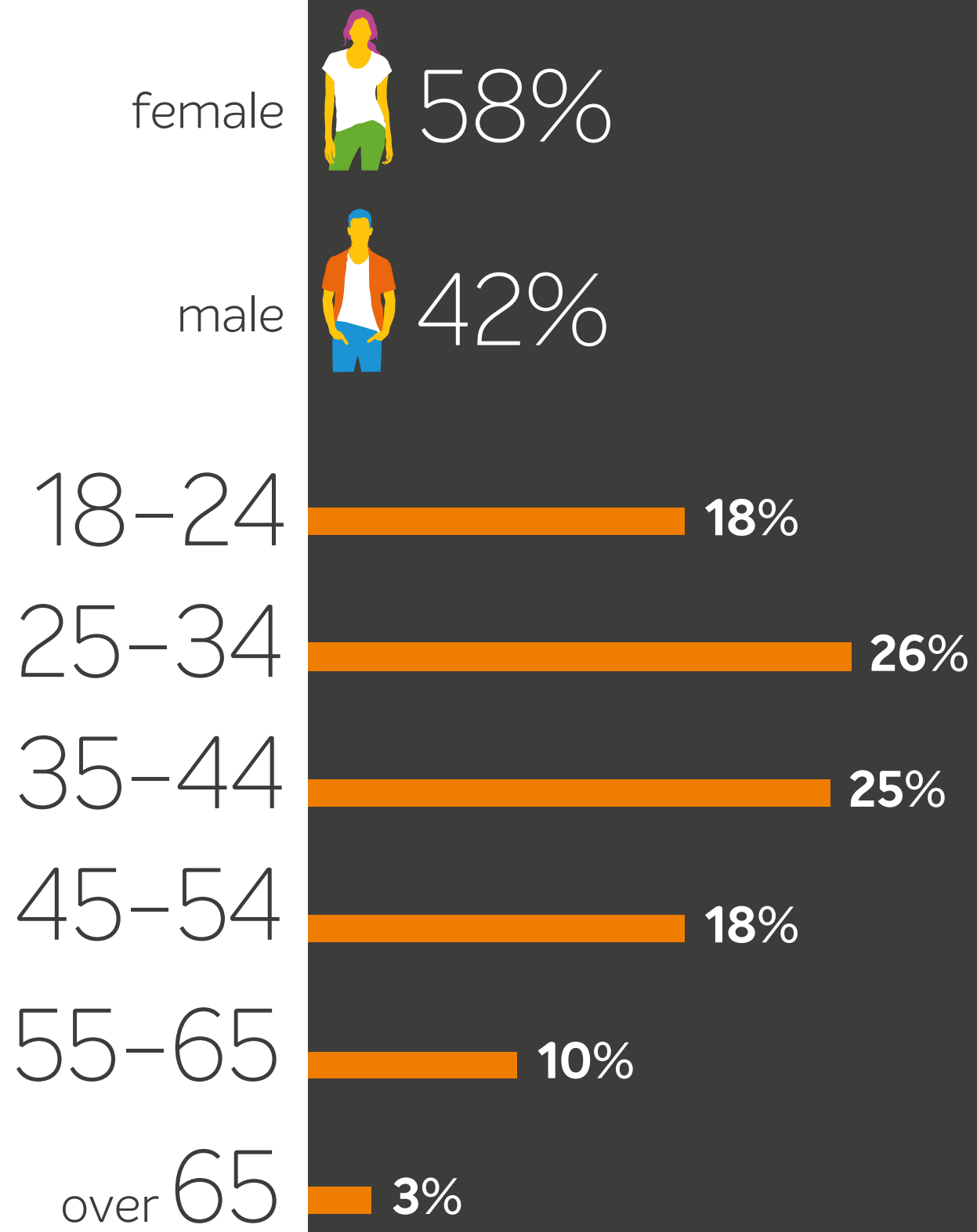
Among non-organic consumers, **13%** said they were very willing to start consuming organic.



Sample Profile - General

Social characteristics

organic and
non-organic
consumers



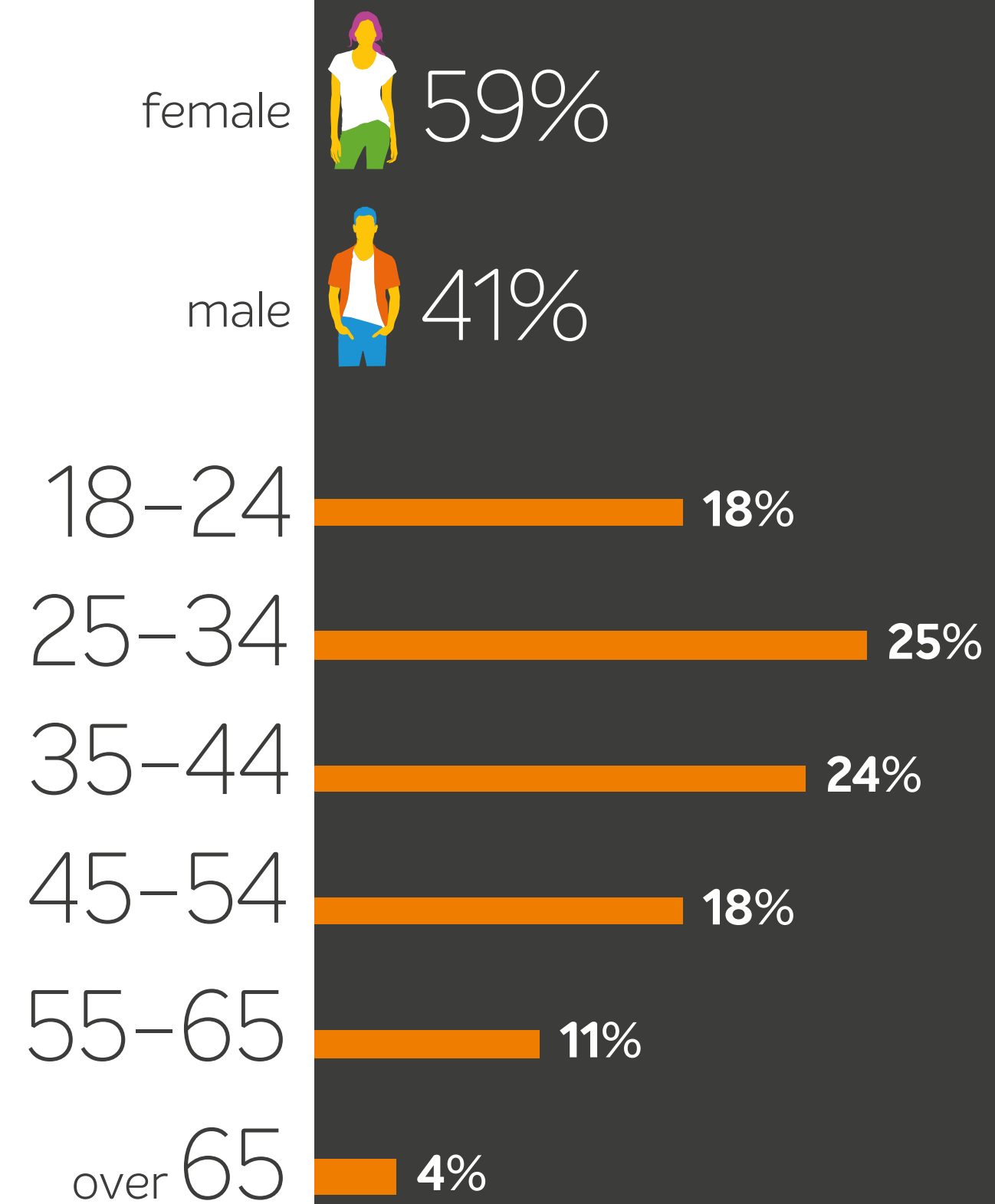


Sample profile

Social characteristics

organic

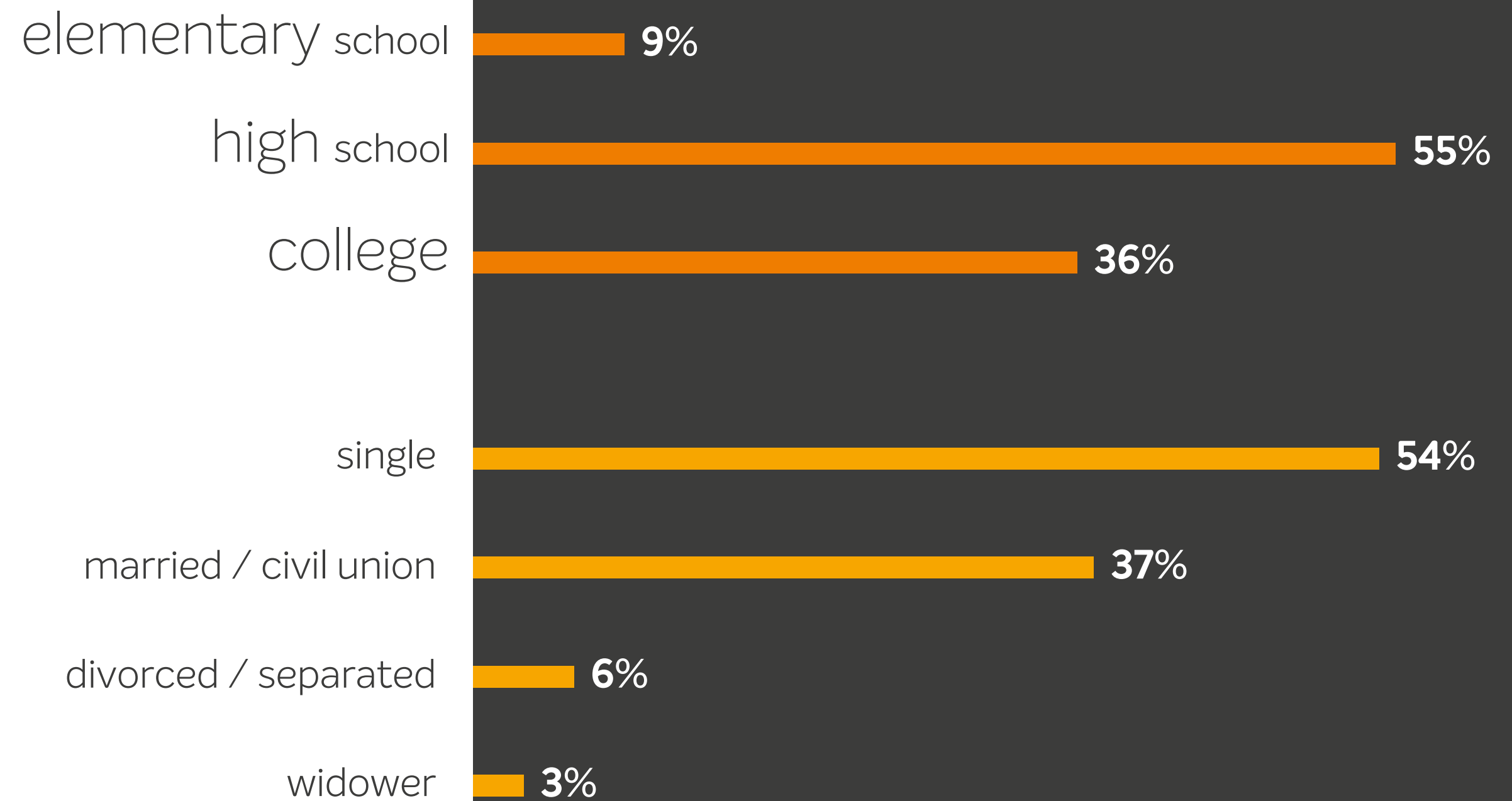
consumers only



Sample profile – General

Social characteristics

organic and
non-organic
consumers



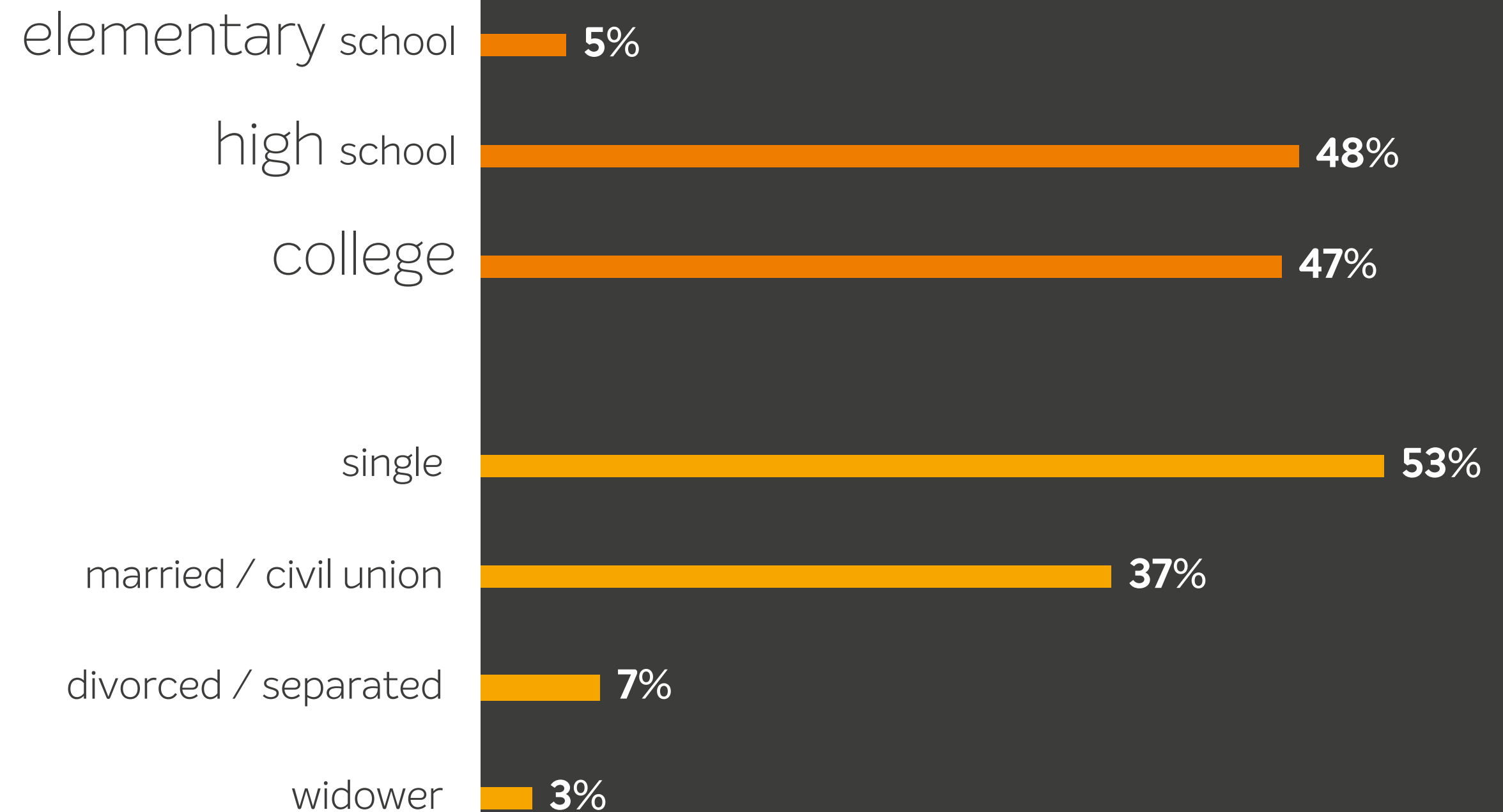


Sample profile

Social characteristics

organic

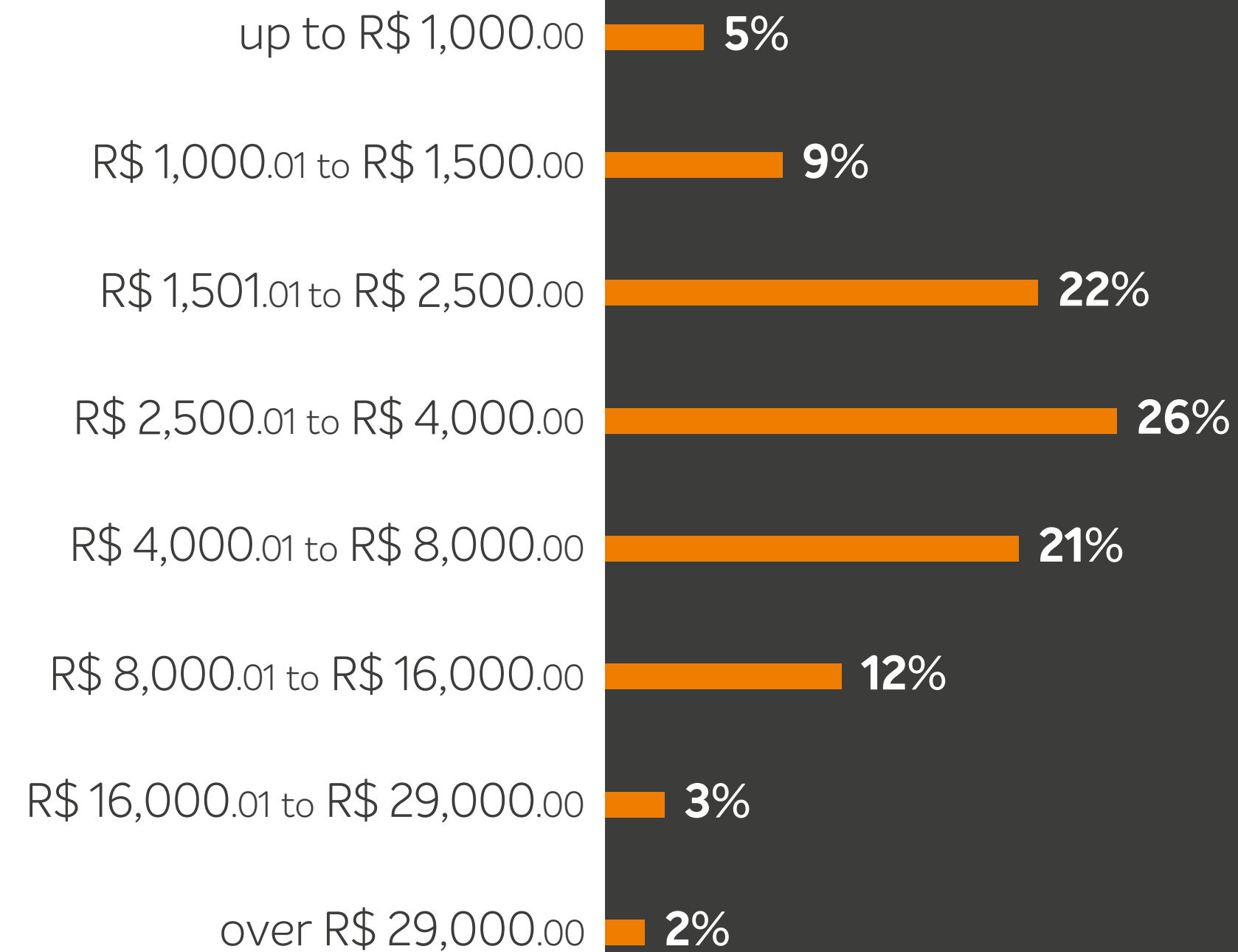
consumers only



Sample profile – General

Social characteristics

organic and
non-organic
consumers



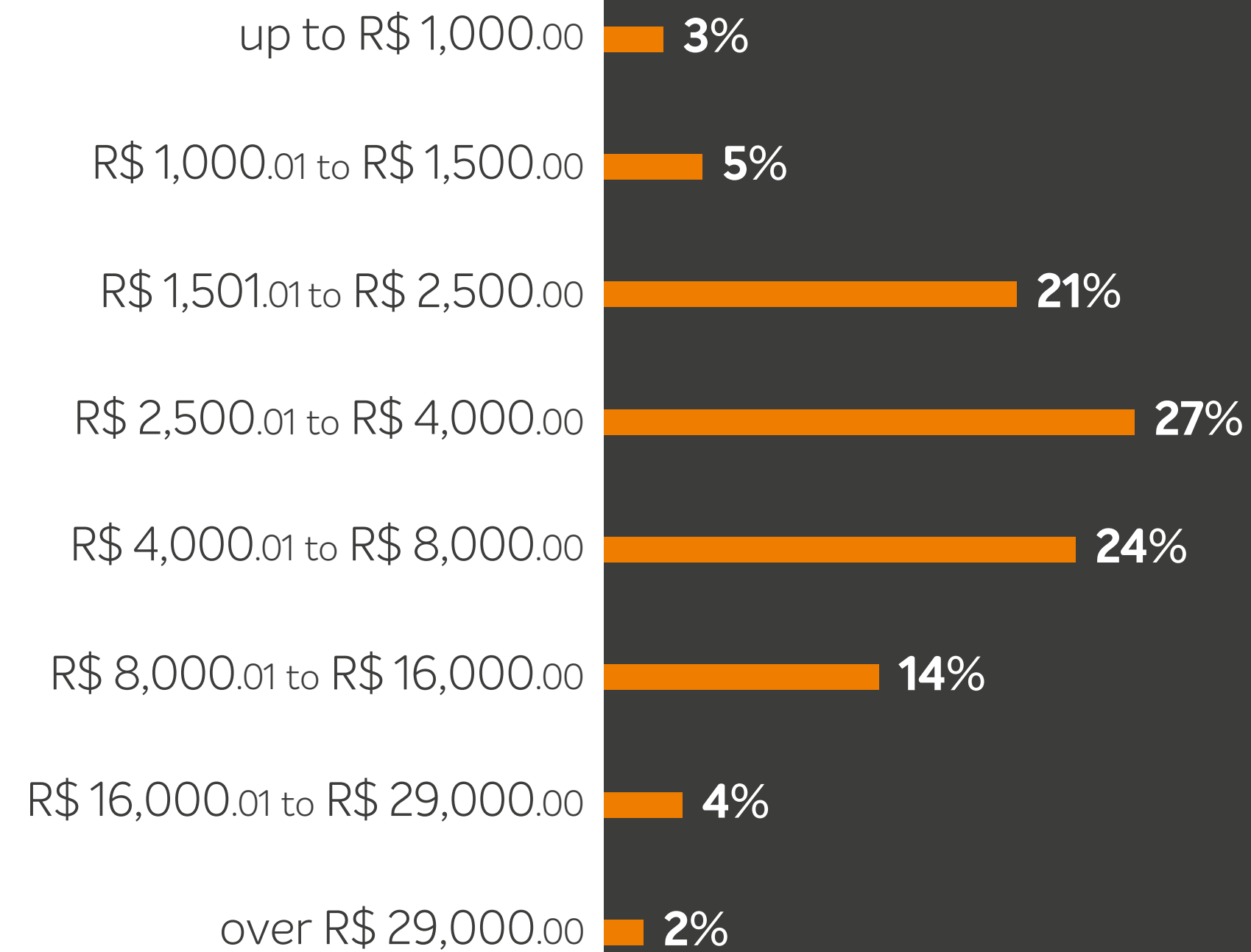


Sample profile

Social characteristics

organic

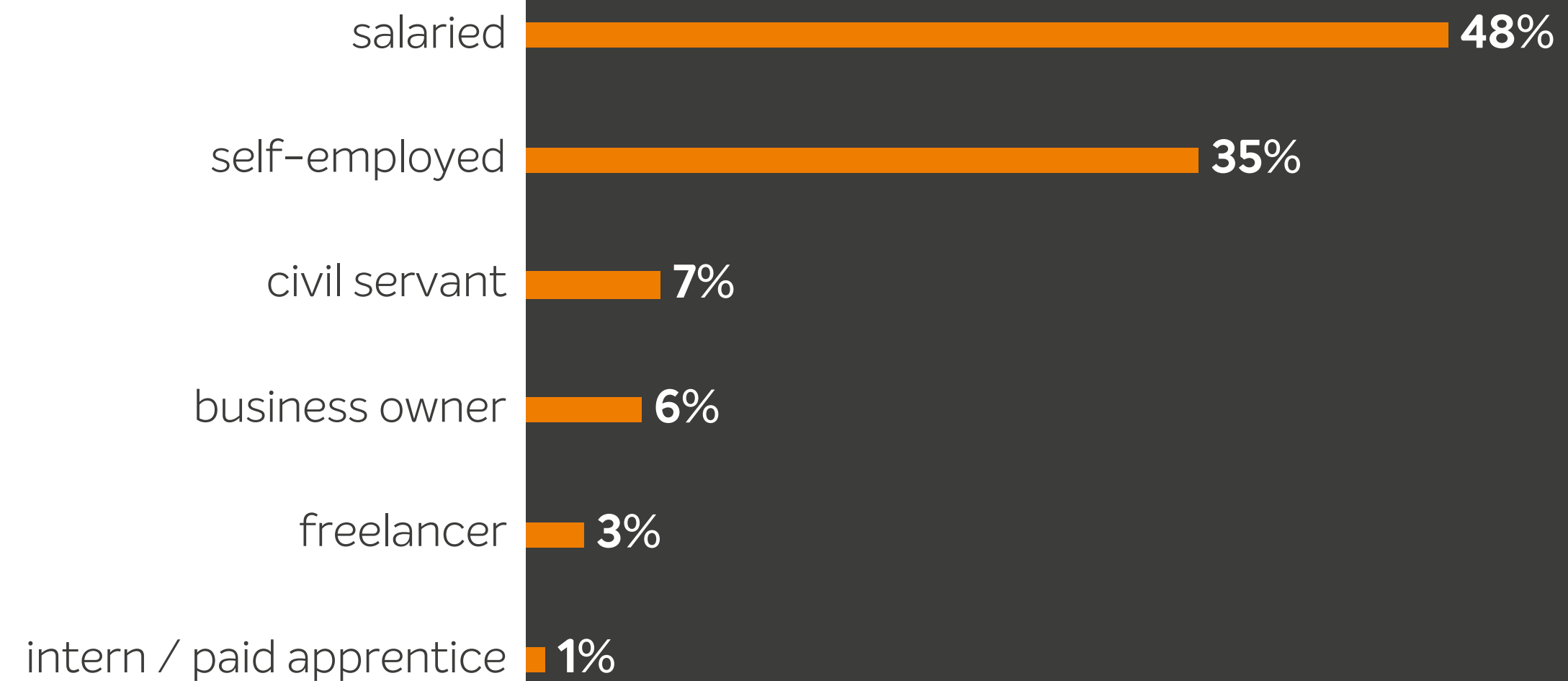
consumers only



Sample profile – General

Social characteristics

organic and
non-organic
consumers



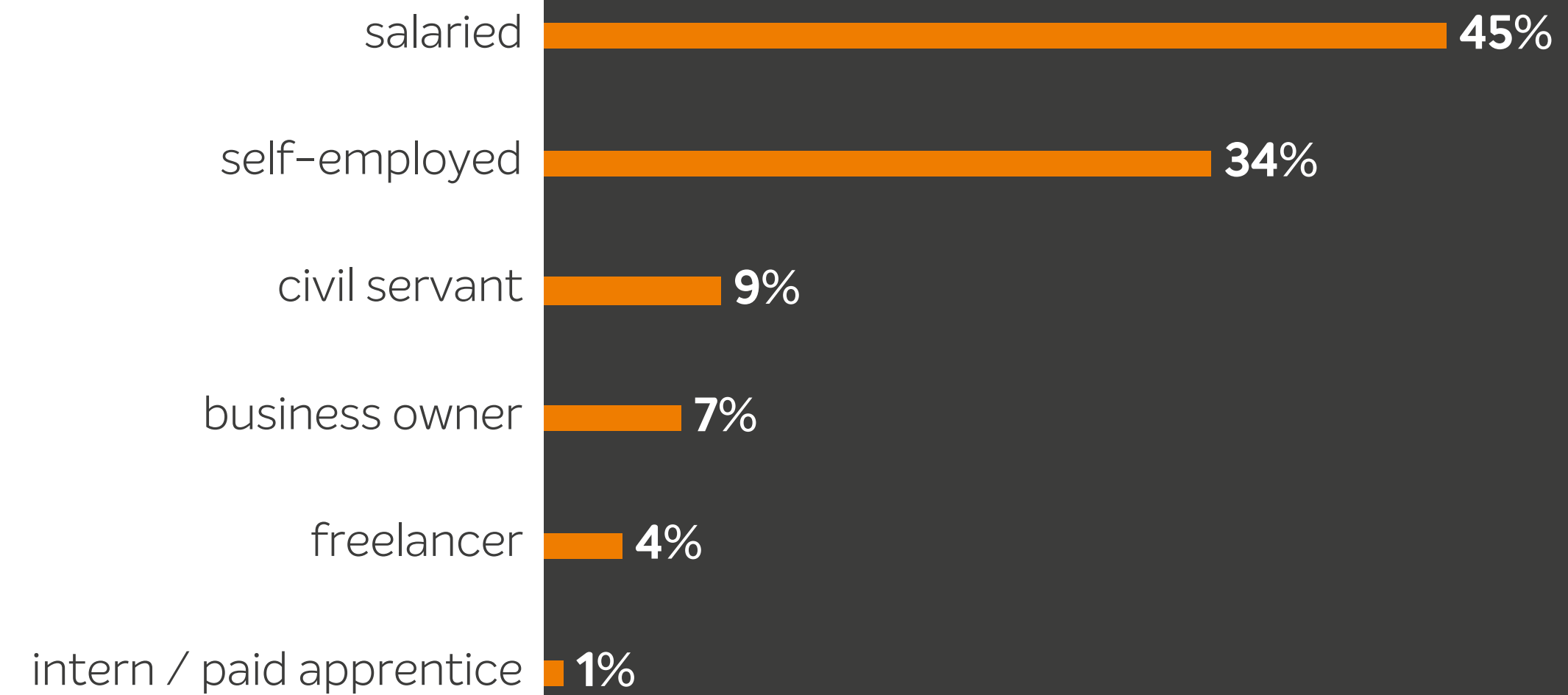


Sample profile

Social characteristics

organic

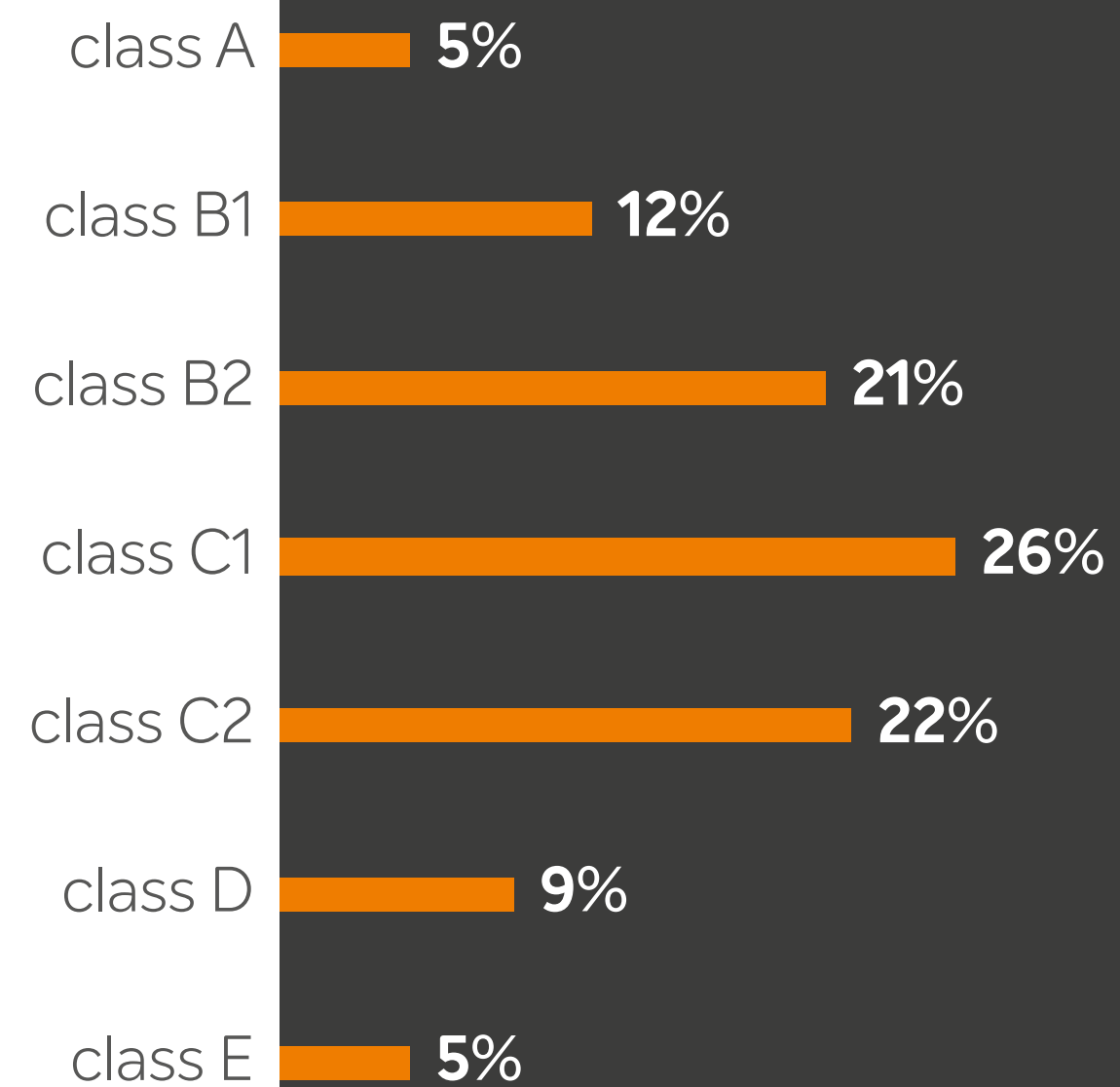
consumers only



Sample profile – General

Social characteristics

organic and
non-organic
consumers



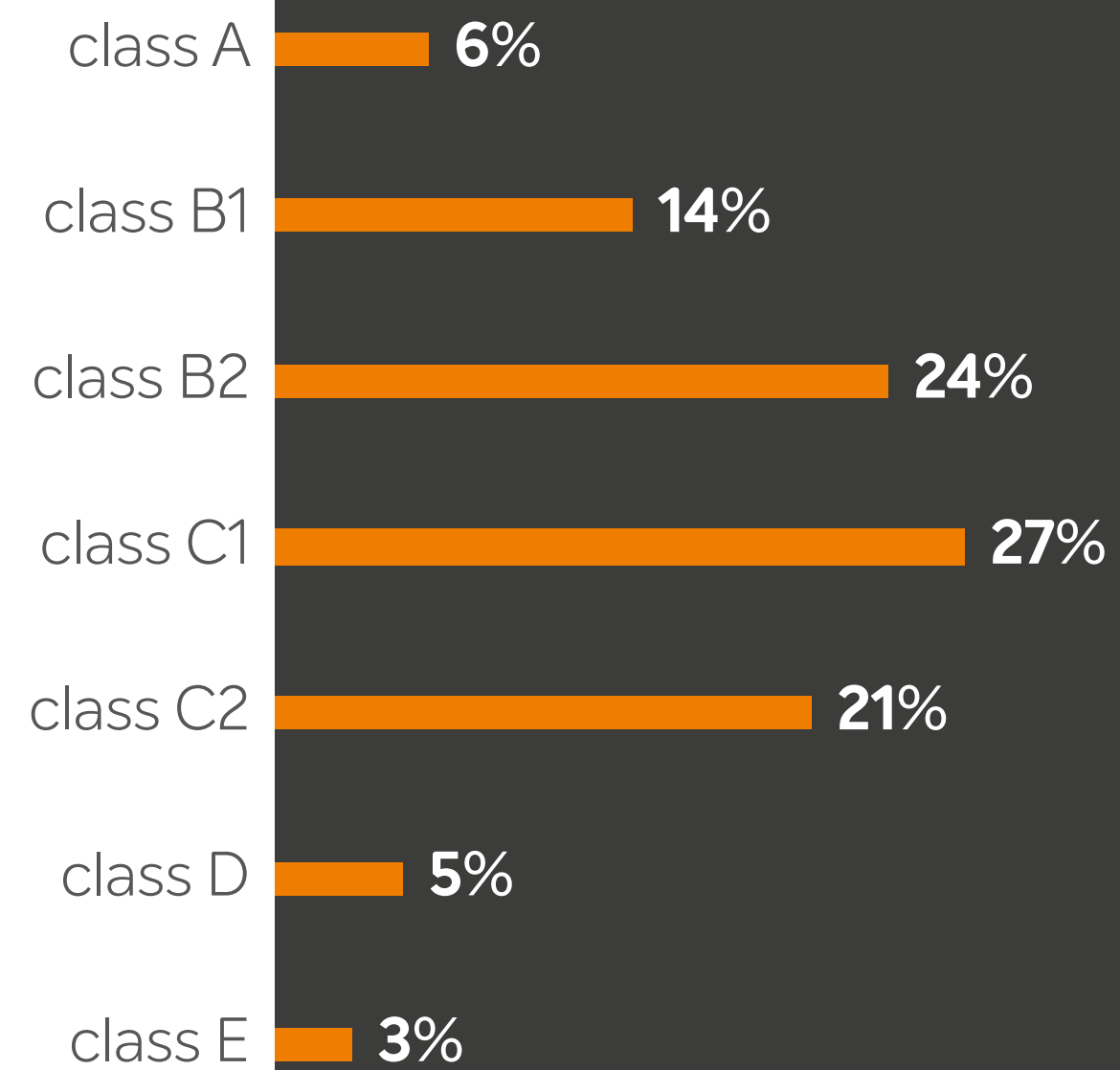


Sample profile

Social characteristics

organic

consumers only



Sample profile – General

Geographical dispersion – Consumers and non-organic consumers



Southeast 48% São Paulo | Rio de Janeiro | Belo Horizonte

Northeast 21% Salvador | Recife | Fortaleza

South 15% Porto Alegre | Florianópolis | Curitiba

Midwest 11% Goiânia | Brasília

North 5% Manaus



Sample profile

Geographic dispersion – Organic consumers only



South 17% Porto Alegre | Florianópolis | Curitiba

Southeast 43% São Paulo | Rio de Janeiro | Belo Horizonte

Midwest 9% Goiânia | Brasília

Northeast 28% Salvador | Recife | Fortaleza

North 3% Manaus

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